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ABSTRACT

This handbook contains a collection of 10 essays on practical skills needed by correspondence educators. The emphasis is on the "how to" of home study. The scope of the handbook includes coverage of the major aspects of providing instructional and administrative service to students, from how to organize the student services department to outcomes assessment. Each chapter begins with an author biography. Chapter titles are as follows: "Student Service Today: The Customer is King" (Michael Lambert); "Total Quality Management in Student Services" (Karen Patena); "Organizing the Student Services Department" (Robert Godfrey); "Supervising Instructional Staff" (Mary McKeown); "The Record Keeping Function" (Dorothy Bascom); "Communicating to Your Students" (Glenn Hoyle); "Testing and Student Service" (Dennis Foltz); "Grading Student Assignments" (Carl Gibbs); "Motivating Students to Complete Their Programs" (Connie Dempsey); and "Outcomes Assessment" (Glenn Hoyle). (YLB)

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Home Study

Student Services Handbook

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Second Edition

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Home Study

Student Services Handbook

Second Edition

National Home Study Council

Home Study
Student Services Handbook

Second Edition

Edited by
Michael P. Lambert
and
Sally R. Welch

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The National Home Study Council (NHSC), a voluntary association of accredited home study schools, was founded in 1926 to promote sound educational standards and ethical business practices within the home study field. The independent NHSC Accrediting Commission is listed by the United States Department of Education as a "nationally recognized accrediting agency." The Accrediting Commission is also a recognized member of the Council on Postsecondary Accreditation (COPA).

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Introduction

This is an all new edition of the *Home Study Student Services Handbook*. Like its predecessor, this Handbook attempts to capture and preserve a collection of essays on practical skills needed by correspondence educators. The emphasis is on the "how to" of home study.

The scope of this Handbook includes coverage of the major aspects of providing instructional and administrative service to students, from how to organize the student services department to outcomes assessment.

The authors of the following chapters are all practicing experts in their field. The National Home Study Council is deeply indebted to them and expresses gratitude for their fine contributions to the advancement of the home study field.

We hope that you will find this Handbook useful and we welcome any suggestions and comments.

Michael P. Lambert
Executive Director
National Home Study Council

April 1993

Chapter One

Student Service Today: The Customer is King

by
Michael P. Lambert
Executive Director
National Home Study Council

The Author

In this initial article, Michael P. Lambert sets the stage for our discussions about student service for the entire Handbook. He calls student service "the heart of the correspondence learning method."

Mike, who has visited over 400 correspondence schools over the past two decades, speaks from a background rich in experience in home study methods. He defines student service, delineates its goals, outlines a number of typical service functions and suggests criteria for quality.

"Good, efficient student service," he writes, "will yield not only psychic but considerable financial rewards to the quality conscious school."

What is Student Service?

In the distance study method of instruction, the teaching institution ("school") is tasked with a bewildering variety of functions: text production, examination grading, counseling, and a host of other often unrelated but critically important actions.

The single most important cluster of tasks performed by a distance study or correspondence institution falls under the general category of "student service." For over a century, home study instruction has prided itself on the "one to one" personalized instruction it provides independent learners.

Student service is, quite simply, the heart of the correspondence learning method. It is the "reason for being" for any quality home study school. In this age of "total quality management"—where the customer is *always* right—the student service staff has come to the forefront of the modern school. Since students enroll in courses without ever seeing a "school," and since they are buying a product sight unseen, it is up to the service personnel to reinforce the message given in the ads and catalogs. Students must be re-sold everyday. Student service has become the home study school's lifeline to profitability.

Student service is also called instructional service, administrative service, or academic service. The important factors are: (1) the teaching institution; (2) a student; (3) all of the interactions each has with the other throughout the student's period of studies.

In essence, student service includes all of the documents, communications, materials, directives, requests, responses, information, and data which flow from the teaching institution to the student.

While most schools divide student services into "instructional" service (responding to subject matter queries, evaluating work) and "administrative" service (e.g., sending new texts), the goals remain the same: prompt, efficient and warm help to students.

The transmission of the materials and services may be oral (via telephone) or written or electronic, as with the "on line" computer networking systems in use today. The services may be performed as a routine, self-generated action on the school's part (e.g., motivational letter) or the services may be triggered by a student's request for help on a problem.

The form the service takes—and the medium used to deliver it—is less important than the *function* of the service itself. The overall objectives of student service are to facilitate the learning process, to assist students in reaching their learning goals, and to ensure the students stay with the course, continue to pay their tuition and become satisfied graduates.

Why is Student Service Important?

Student service is important because without it a correspondence institution would probably be a textbook publishing house, not an educational institution.

Student service is important because *studying* students pay their tuition bills. Today's home study learners—most of whom are adults—expect and demand quality. And, they expect a high level of service over the period of their studies.

Student service is important because students are ***not*** buying texts to read on their own: they are enrolling in an institution which has promised to teach them, to facilitate learning, and to help them to reach publicly announced educational outcomes. Students have a perfect right to expect warm, friendly, and responsive assistance from "their school."

The mystique of independent study via correspondence is inextricably bound up in a match between learner and subject, learner and text materials, and learner and the "school." Servicing the student throughout the enrollment period is the glue which bonds these inter-dependent parts. An organization purporting to call itself a distance study or correspondence school which does not conduct an on going, vigorous, responsive service program with students is not a correspondence institution at all.

Student service is what home study students are really buying when they enroll. Because they have chosen to study independently, without the mutual reinforcement of classmates, without the immediate feedback available from a teacher in a classroom, without the rigid schedule enforced by class attendance, without (sometimes) the resources of a laboratory or a library across the campus, home study students deserve a teaching institution which is dedicated to fast, efficient, high quality service, delivered on demand.

Finally, student service is important because it provides healthy returns to a school. Good, efficient student service will yield not only psychic but considerable financial rewards to the quality conscious school in—

1. Higher course completion rates
2. Higher tuition collection rates
3. Lower tuition refund rates
4. Increased referrals of new students
5. Higher re-enrollment rates.

The Goals of Student Service

The goals of home study student service can be said to include actions by a school which:

- facilitate and enhance learning
- ensure course completion
- provide fast and efficient responses to student requests
- respond promptly and fairly to student complaints or problems
- treat each student equitably
- supplement independent learning with reinforcement from the school.

Every department—for that matter every person—in a correspondence institution has a role to play in executing specific tasks which will help achieve these goals. Course writers, instructors, administrative clerks, warehouse personnel, counselors and field representatives all have critical roles to play to ensure that each of these goals is met for each student.

The entire school should be considered a ***customer driven organization*** which is dedicated to servicing students in every feasible way. Thus, the primary objective of every school could really be summed up in three words: "Service to Students."

Checklist for Services

In considering what types of student services should be provided, correspondence educators should ask these questions:

Is the service—

- ❒ functional to both the type of students enrolled and the nature of the subject matter?
- ❒ appropriate for the level of the subject? Are degree students given "college level" attention?
- ❒ cost effective? Is there a logical balance between the expenditure of funds for service versus marketing costs?. . .versus the results gained by providing the service?

- ❒ available and fair to all students? (Do all students have an equal opportunity to access the service?)
- ❒ compatible with the school's ability to provide it in an effective way?
- ❒ appropriate to the home study/distance education method?
- ❒ able to contribute to the overall goals of learning enhancement and course completion?
- ❒ able to make good use of the strengths of correspondence instruction (personalization) while compensating for its constraints (space and time)?
- ❒ able to capitalize on the subject matter? (Does it give services which are course-related, e.g., evaluation of a travel itinerary in a travel course?)

What Kind of Services?

Early in the development of any new home study course, course developers should meet with top management and the educational director to determine what types of student services need to be in place by the time the course is ready to be marketed to the public.

The course author/developer(s) can be a rich resource of ideas for creative student service. By careful planning, student service can be incorporated directly into the course materials and study assignments.

The resulting product is then an integrated, coherent learning experience, not a stack of books slapped together with a series of sterile, paper and pencil tests. The service a school renders should be a logical extension of the learning experiences and tasks in the texts.

In approaching course development, the school must be alert to potential student service opportunities—the school should strive for every reasonable opportunity to provide personalized, useful service to students. The opportunities and features can include:

- convenient, attractive course packaging

- easy to understand study instructions
- easy to locate course components
- handy "request for help forms"
- where to get information or help from the school
- how to troubleshoot problems
- laminated student I.D. cards with toll-free telephone number.

Other popular student services ideas are:

1. toll-free telephone service—response to queries
2. progress reports mailed to employers
3. fax exam services
4. newsletters or "technical tips" sheets
5. motivational letters to encourage study
6. how to study or "learning to learn again" video and audio tapes
7. stamped envelopes for exam returns
8. job placement assistance
9. academic transcript services
10. personalized critiques on audio tapes
11. on line telecommunications option (and telephone grading of exams by a computer).

Our list of student service ideas and opportunities could go on for pages. The key points are that service should be ***built into the course itself***; and service should be ***second nature*** to the school's staff.

Student Complaints: An Asset

NHSC records show that for the many hundreds of thousands of students studying with NHSC accredited schools each year, the overwhelming majority are totally satisfied with their home study experiences.

In fact, over 80% of the NHSC membership has not had a complaint filed against them with the NHSC office in recent years. This is excellent testimony to the quality of education available from accredited schools.

But students sometimes experience difficulties. Perhaps they didn't understand the "fine print" in the catalog. Maybe they feel that they've been "sold a bill of goods." In most situations, prompt, friendly and open communications from the service staff can prevent an irate or unhappy student from becoming a complaint statistic.

Customer service experts tell us that for every complaint a company receives, ***there are 26 silent, dissatisfied customers out there.*** Fewer than 4% of a company's customer base will bother to complain, but of those who do not complain, 63% will switch companies.

A student complaint—when a school receives one—should be viewed as an opportunity to do "something special" for the student. It is a golden opportunity to save a potential dropout. Complaints are an asset in the sense that they can help you identify a weakness in your product, a breakdown in your service, or a miscommunication in your advertising.

Complaining students give a school the chance to "make it right," to re-sell the student on the school, possibly saving the school from a costly refund situation or even a subsequent legal challenge to the school.

When students continue to remain unhappy with a school, they may—and often do—turn to third-party agencies such as the Better Business Bureau, an Action Line Editor, Consumer Protection Office or even the NHSC. Third party complaints are extremely expensive for a school—and nearly all of them are preventable! One third party complaint can cost up to $1,000 or more in executive time, not to mention the expensive time of legal counsel, which can result from such situations.

Complaints are an opportunity for saving a student and for improving your services. Handled properly, complaints are an asset to the alert institution. Handled poorly, they can become a financial drain and a public relations disaster.

Benchmarks of Quality Service

In looking at the variety of service offered by home study institutions, we find a commitment to excellence, a genuine desire to help students.

Just what is excellence in student service? No hard and fast uniform standards can be applied. The differences between institutions are too great to advocate a single standard.

Still, quality in student services is readily apparent. Here are just a few characteristics of good student service:

1. Course materials are attractively packaged and are easy for students to use.

2. Materials are shipped promptly—students can begin their first lesson within a few days of enrollment.

3. Students always have an adequate supply of materials to study at all times.

4. Defective course texts or kits are replaced promptly and without question. And at no further expense to students.

5. Assignments and exams are processed and graded promptly—and are in the student's hands within a two to three day time frame (starting with the day the assignment is received by the school). Assignments have motivating, customized comments (handwritten or computer-generated), pertinent notations and other evidence of personal attention.

6. Non-technical inquiries are handled immediately—simple requests are filled on the telephone or within one day by mail.

7. Subject matter inquiries merit individualized, warm responses, and satisfactory answers are in the student's hands within a week after receipt of inquiry.

8. Student's ability to access the school is easy, simple, and even fun! Students who ask questions or have problems should feel they have received personal, quick attention.

9. Students should feel their school cares about them—warm letters of motivation, frequent school-generated contacts (e.g.,

newsletters) can make students feel they "belong to an educational institution which cares about them."

10. Everything the school provides the student, from texts to motivation letters through collection communications to end of course diplomas, should reflect high quality, competence, taste, and an obvious commitment to service, service, service.

There are dozens of other characteristics of professional student service in a school. These are but a few. The ultimate criterion is the customer/student's satisfaction. If students aren't satisfied, they will let you know!

Correspondence students are, for the most part, adult, mature, self-motivated people. They generally (99 times out of 100) are paying their own tuition out of their own pockets. They expect quality—and are willing to pay for it. If a school is spending less than one third of tuition dollars received on servicing an enrollment, then it can expect less than satisfied students . . . and eventual erosion of its position in the field. Professional service is a key to financial and educational success in home study.

The remaining chapters in this Handbook explore the rich diversity of student service opportunities.

The concept to remember as you read this Handbook is "service to students is what correspondence instruction is all about!"

Ways and Times to Provide Service

Here is a potpourri of ideas for the home study professional on the ways and times to provide service to the correspondence student:

On inquiry—

- personalized response related to prospect's interest
- offer to discuss or consult if prospect has questions
- adequate follow-up
- detailed information on course content and school service

On enrollment—

- individual analysis of student's qualifications and interests

- telephone verification
- letter of welcome
- attractive starter packet
- "soon-after" enrollment survey on personal data

While studying—

- school bulletin or newsletter
- appropriate, personalized comments on assignments
- periodic academic assessment
- along-the-way certificates for progress made
- student surveys
- making the most of course revisions-technical bulletins
- subject field updates
- enrichment audio or video tapes
- regional seminars, help sessions
- special recognition for achievement, scholarship
- online exam and inquiry service

When academically delinquent—

- regular follow-up
- special telephone call for lesson submission
- opportunity to extend time, take remedial programs
- telephone reminders

When financially delinquent—

- timely reminders
- special incentives for catch-up, paying ahead
- coordinated effort if academically delinquent
- letter/postcard stimulators
- refinancing offers

When the school has a problem, explanations about—

- inventory shortages
- slow mail
- backed-up lesson or kit processing
- computer mix-up

- status of student's complaint
- change of address or school procedures

When there is a Complaint—

- special handling—telephone response
- no quibbling over inconsequential details
- fair, firm, consistent position
- prompt and cheerful settlements, take the credit!

At graduation—

- attractive diploma
- special recognition for exceptional academic achievement
- letter or call of congratulations
- school-prepared announcement for student to give local paper, employer
- rings, pins, ties, etc.
- end of course survey
- placement consultation
- résumé preparation assistance
- request for referrals of friends to enroll

After graduation—

- placement assistance
- updating résumés
- periodic newsletters
- alumni associations
- alumni trips and meetings
- advanced courses; follow-up enrollment
- brush-up short programs
- consultation on course-related questions
- alumni surveys
- alumni referrals
- scholarship opportunities

NHSC Home Study Survey

In recent years, the result of an *NHSC Home Study Survey* showed:

- 87% of NHSC schools have instructors who write comments on submissions;
- 71% of the school instructors write personal letters to students;
- 38% of the schools offer a fax exam service;
- 44% of the schools use toll free telephone service for educational purposes;
- 73% of the schools use pre-printed motivational letters; and
- 67% of the schools publish a newsletter/magazine for their students.

Chapter Two

Total Quality Management in Student Services

by
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The Author

Karen currently serves as Director, Independent Study for the American Health Information Management Association in Chicago, Illinois. AHIMA is an organization of more than 35,000 credentialed specialists in the field of health information management. The Independent Study Division administers home study courses in Medical Record Technology and Coding.

Karen is a member of the Product Team and Quality Improvement Council at AHIMA. She is a credentialed Registered Record Administrator and received a Masters degree in Business Administration from DePaul University in Chicago.

Introduction

Total Quality Management (TQM) or Continuous Quality Improvement (CQI) are buzz words that are important to success in any business today. Student service and quality control can work together to make your institution outstanding within the home study field.

What is Quality?

Quality is consistently meeting and/or exceeding your student's expectations. Quality is whatever your student says it is. Quality

is the sum of the attributes of a product or service that meet the needs and expectations of the user, as perceived by the user. It is student Satisfaction, with capital "S," and it requires leadership, teamwork, and the right tools to make it a reality.

What is Service?

There are certain characteristics of service that place special demands on quality improvement. These include:

- Intangibility
  Service must be experienced. It cannot be demonstrated before it is delivered. It cannot be stored or stocked.

- Difficult standardization
  Student expectations are very individual.

- Delivery out of the direct control of management

- Front line impact
  Often the lowest paid, lowest status employee has the greatest influence on student satisfaction.

- Satisfied employees = satisfied students
  There is a high correlation between student and employee satisfaction in service delivery.

- 100% reliability expectations
  Students have a zero failure tolerance level for service delivery. They have a high level of trust in the educational institution to "get it right" the first time.

Who are Your Students?

In order to meet or exceed your students' needs, you must first identify who the student (or potential student) is. Selecting the right students for your programs can increase completion rates and tuition collection rates. The satisfied student will probably be a source of referral for future students.

Students are the reason for which your organization exists. To lose sight of this economic fact of life is to lose sight of your reason for existing.

A good starting point for identifying the correct student market is to collect as much data as possible about successful graduates. Mail or telephone surveys, if designed properly, can yield much of this information.

Identifying the Needs of Your Students

Once you know your student, you must identify his needs, expectations, and perceptions.

A NEED is a determinant of behavior. A student NEEDS to receive an education in a certain vocation.

An EXPECTATION is the student's specifications of how his need can best be satisfied. A student EXPECTS to have his exam returned within one week.

A PERCEPTION is the student's evaluation, based on his experience, of the conformance to his expectations. A student PERCEIVES his exam was graded promptly and correctly, and he received good instructor feedback.

There are many tools you can use to determine your student's needs, expectations, and perceptions. Some of these are listed in Figure 1. A major objective of every institution should be to build a data base of students' needs, that continually is reviewed, updated, and used. These become a school's focused goals.

Figure 1

Determining Student Needs, Expectations and Perceptions

1. Telephone and mail surveys
2. Focus groups
3. Suggestion programs
4. Complaint tracking
5. Student advisory boards
6. Informal discussions with students
7. Post-critical event follow-ups
   Note: A critical event is any point in time that shapes a customer's perception, both positive and negative
8. Joint product/service development teams
9. Benchmarking the best practices of competitors
10. 800 toll free numbers
11. Student service departments

There are three ways students may perceive quality:

- REQUESTED—The expectation is specifically stated. A potential student requests information on your program sent out *today!*

  If the expectation is *met*, the student is *satisfied.*

  If the expectation is *unmet*, the student is *dissatisfied.*

- EXPECTED—The expectation is unstated. A student expects to receive a kit that is new and in working condition. Sometimes this one is difficult to meet, as you must be a mind-reader!

  If the expectation is *met*, the student is *satisified.*

  If the expectation is *unmet*, the student is *dissatisfied.*

- EXCITING—No expectations exist, because your student has not thought of these features. Each new enrollee might receive a tote bag with the school's name.

  If the feature is missing, your student is *not dissatisfied.*

  If the feature is present, your student is *delighted!*

Exciting quality sets new levels of customer expectations, and should be the level for which you strive.

The Path to Quality—Three Modes

There are generally three ways quality may be delivered by your institution. All three have specific applications in the attempt to meet and exceed student expectations, but by far the most powerful mode is prevention, with its emphasis on finding and eliminating the causes of student dissatisfaction.

- RECOVERY—Recovery is a second chance to meet student expectations. It is the most costly, but easiest to implement. Recovery can only occur once the institution has failed to meet the student's expectations. The problem is that most student's fail to complain. Non-complaining students

range from 37% to 60% of all dissatisfied students. Of those who do complain, only 5% take their complaint all the way to management. This means management only hears 1 out of every 20 complaints.

- INSPECTION—Inspection finds the problem after something has been done but before it reaches the student.The problem with this method is that it does not remove the cause of the student's dissatisfaction. It is difficult to inspect service, because it is produced and immediately consumed.

- PREVENTION—This method is the least costly to implement, but the most difficult. It focuses on delivering the service right the first time. The emphasis is on planning, testing, and training, and focuses on what the student expects. The key again here is to develop an excellent data base of student expectations.

Organizing the Staff for Quality

In order for an institution to function with a CQI environment, there must be a fundamental change from traditional management style and organization charts to one that allows not only employee participation but EMPOWERMENT. Employees must have the authority and responsibility to act on their own. The barriers to change must be removed. Generally this means a switch from the "top-down" theories learned in management schools.

The basic philosophy of the administration must change from

PLAN - DIRECT - CONTROL

to

TRAIN - EQUIP - TRUST

The basic organizational unit of the CQI institution is the TEAM. A team is a group who combines their skills, talents and knowledge to achieve shared goals.

Once the organization has identified its students' needs, it is time to form the first team, a leadership group who will have responsibility for formulating the quality philosophy that will drive the

institution, and mold it into a quality vision statement and strategic quality plan. This team will also set quality policy and improvement objectives. It may have several names, but is usually called something like the Quality Improvement Council, or QIC. The members of the QIC become the first leaders of other teams.

Senior management, over the long term, must become fully committed to the CQI process. The greatest breakthroughs in quality organizations have come to those with total management support. It cannot be approached with the idea that "someone else can handle the quality stuff here—I don't have the time or interest."

The Quality Vision Statement

One of the first tasks of the Quality Improvement Council, in the organizing stages, is to form the Quality Vision Statement. This is a clear statement of what the institution believes about its students, employees, and the very nature of its work. It states the mission of the institution and why it is committed to quality improvement. It serves as the philosophical "glue" which holds together all the other strategies comprising the total quality process.

The Strategic Quality Plan

Most institutions have developed a strategic plan, which details its business plans and goals for the long term. The Strategic Quality Plan (SQP) is similar. It translates the assessment of student needs into objectives and milestones for improvement.

Beginning with the Quality Vision Statement, "quantum leap goals" are formed. These are goals that may seem impossible to achieve at the present, and represent paradigm shifts. If the quantum leap goals are achieved, it would indicate that the institution had become a "world class" quality organization. An example might be a goal that all students receive a personal contact and follow-up on a monthly basis rather than simply motivational letters.

The Strategic Quality Plan usually contains the following elements:

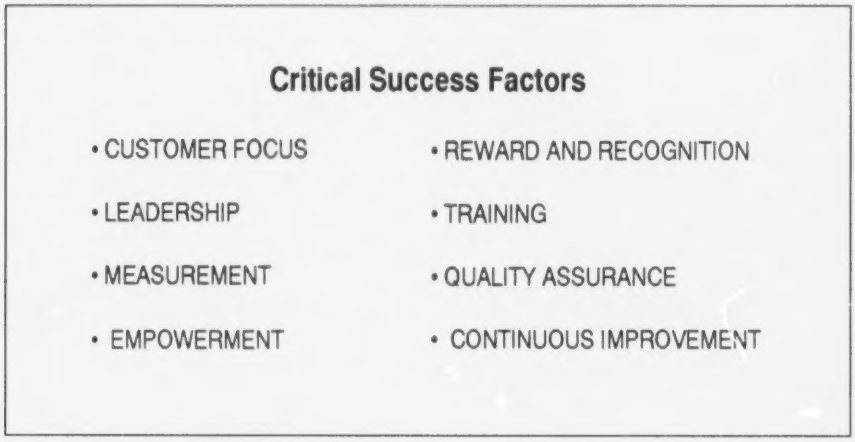
- Description of the quantum leap goals

- Description of plans to achieve the goals, listing smaller objectives which are measurable
- Milestones which define major developmental achievements (systems, processes) which one would find in a world class quality organization
- Current fiscal year actions, by milestone, which support the achievement of the milestone. Action statements should specify the responsible group or individual and the time period for achievement
- Supporting documentation, such as a Gantt chart, of all milestones, both in the long and short term
- Explanation of how actions will be deployed, and timing and method of progress reviews.

Critical Success Factors

For an institution to be successful at implementing a quality improvement program, there are several "critical success factors" that must be present. The Strategic Quality Plan should address each one in its milestones. Typically, one member of the Quality Improvement Council is selected to champion each factor. The first teams to be formed are organized around the factors (see Figure 2). Critical success factor teams are planning teams that are ongoing, and shape the direction of the institution's policies and practices.

Figure 2



Customer Focus and ***Leadership*** are foundation concepts of CQI. Any quality improvement process which does not have at its core the desire and ability to understand student needs, and to systematically deliver those needs, is doomed to failure. Student focus should be reflected in the design of materials and services, as well as frequent and direct student contact for all employees and managers. There must be measurement systems which accurately portray student satisfaction levels.

Management leadership plays several important roles in the CQI process. Constant repetition of the continuous improvement message, in words and actions, is the primary contribution senior management can make to quality improvement. Total quality must be fully integrated into the institution's strategic plans. Managers must remove fear and empower employees. Employees who are fearful of retribution will not offer improvement ideas. Managers who share their power with employees find their ability to satisfy students, the real source of their power, increased by empowered employees.

Measurements help to identify root causes of failures to meet student expectations. Things that get measured, get recognized, and get done! Be careful not to confuse measurement of activity with measurement of quality. The real value is in measurements which reflect the organization's performance in meeting and/or exceeding student expectations.

Empowerment allows employees to assume many of the "traditional" management functions. The goal of empowerment is to give the employee what he/she needs to serve the student. These include areas like decision making, problem analysis, and process management and improvement.

Reward and recognition systems direct employee behaviors in directions set by the institution's quality strategies. Recognition is less tangible than reward, but highly valued.

Training must occur in the business skills traditionally associated with managers, as well as technical and interpersonal skills. Student expectations shift and employees must keep pace.

Quality Assurance is closely tied to your measurement system. It should be based on a "prevention" mode rather than "recovery." The product/service delivery cycle must begin and end with quality assurance.

Continuous Improvement is ongoing and incremental positive change based on student expectations. While problem solving is ***reactive***, improvement is ***proactive***, moving to new standards of performance, exceeding student expectations.

Team Building

Teams of many types are integral to the continuous improvement process. Teams are able to draw on the ideas and experiences of their members to create improvements. Teams may be organized around functional work units, cross-functional work units, or be self-managing. Teams facilitate job ownership, aid creativity and innovation, evenly distribute workloads, add flexibility, and foster growth of leadership skills.

Functional teams all work in the same area, often defined as a department, performing the same basic function. Examples are accounting, order fulfillment, and marketing.

Cross-functional teams bring together team members from two or more functional teams to work on improving a process or removing a problem for which they have joint accountability. This approach encourages "big-picture" thinking.

Self-managing teams are cross-trained to perform a broad range of tasks, often on a rotating basis. They are designed around a set of student needs and are responsible for producing an entire product or service. This is the most highly autonomous of the three types and assumes many of the traditional management functions.

Successful team management requires a few basic skills. A team is most effective when the use of the skills is self-enforced.

Ground rules are the behavioral expectations and operating procedures by which the team agrees to manage itself. Ground rules allow team members to know what is expected of them. Examples may be showing up on time for meetings, and how decision making will be accomplished. Operating procedures deal with things such as the time, location, and frequency of meetings, and procedures for team leadership.

Tools for Process Improvement

Continuous improvement results from having the tools and skills to analyze work processes and design improvements. A work process is the flow of inputs, the tasks performed on the inputs, and the resulting outputs. Problems and improvements may occur at many points in a process.

Solving problems and making improvements is a process in itself, and there are sequential steps to it. Tools are available to manage each step in the process. Figure 3 outlines the problem solving process.

Figure 3

The Problem Solving Process

- Situation Analysis
- Objective Setting
- Alternative Development
- Adverse Consequence Consideration
- Communication and Implementation

You must begin with ***Situation Analysis***. In this step you develop a thorough understanding of the problem and its symptoms. A good starting point is with a flowchart of the process. A flowchart is a visual representation of the process and the flow of materials and services. Problem areas can be more easily identified. Major problems and opportunities can be identified by collecting data and presenting it in a Pareto chart or histogram. A Pareto chart demonstrates the "80-20 rule", or the fact that most causes of problems fall into a few categories. Histograms can also help visualize the frequency of problem occurrences.

Objective Setting separates goals from specific actions. It minimizes "jumping to conclusion" and helps the group focus on a specific direction. A tool to use here might be a Cause and Effect,

or "fishbone" diagram (so named for its appearance like the skeleton of a fish). A problem is written in the far right side of a flipchart or blackboard, and various inputs to a process are identified, such as people, equipment, and procedures—the spines of the fish. A group of people then brainstorm ideas, adding as many possible factors as possible for each of the input areas. The idea is to identify areas for action to improve a process.

Alternative Development also works with a cause and effect diagram. Again, as many ideas as possible are solicited, as the first solution may not always be the best.

Adverse Consequence Consideration is the step where all ideas identified in the previous step are critically reviewed. Consequences of each idea are considered.

Once consensus is reached on the improvement idea, support of the entire staff is needed. The last step is ***Communication and Implementation***. Dr. W. Edward Deming has identified the P-D-C-A cycle:

Plan— Consider all phases of implementation, including what, when, where, and how.

Do— Carry out the actions.

Check— Measure outcomes, and manage by fact.

Act— Analyze the results and act on them.

Continuously improve by repeating the cycle as necessary.

Training—The Key to Success

Many new concepts have been presented that must be thoroughly understood by all staff members if an institution is to successfully change to a world class quality organization. The place to begin is with training.

Four key areas of training are recommended:

1. The Basics of Continuous Quality Improvement (defining quality and service, identifying student needs, strategic planning, staff organization)

2. Team Building Skills (what is a team, how to function as a team, organizing a team, conducting meetings, decision making)

3. Tools for CQI (the problem-solving process, flowcharting, cause and effect diagram, brainstorming, P-D-C-A)

4. Skills for empowerment (management skills, project planning, technical/professional skills, interpersonal skills)

Quality improvement requires time as well as management commitment. Important things to remember when getting started:

· Do whatever you can, wherever you can, as soon as you can

· Small wins are OK

· There are no mistakes, just unintended results

· Accept that you will go two steps forward and one step back

· UNDERPROMISE and OVERPERFORM

The rewards of quality in student service will be many, and worth the effort!

Figure 4

Checklist for Implementing TQM in Student Services

- ❒ Complete an assessment of your student's needs.
- ❒ Select a council which will be the leadership group for resource and planning.
- ❒ Develop a vision statement and strategic quality plan for the institution.
- ❒ Select team leaders for the Critical Success Factors.
- ❒ Perform training and education in the four key areas.
- ❒ Form teams based around functional activities to start. This may necessitate organizational redesign from the typical "department" structure. Teams may reorganize continually as processes change.
- ❒ Improve processes using the tools of quality.
- ❒ Measure, evaluate, and get better and better!

Chapter Three

Organizing the Student Services Department

by
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President and Director
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The Author

Rob has been employed by the Truck Marketing Institute (TMI) since 1967, three years after his father, James E. Godfrey, founded the Institute. Rob became President of TMI in 1992. He has assisted in the research and writing of numerous home study courses. He most recently authored for the National Home Study Council the Outcomes Assessment Handbook.

Rob is a member of the NHSC Research and Educational Standards Committee and chaired the 1984 Correspondence Education Workshop at Notre Dame. He has also served as an evaluator on numerous Accrediting Commission examinations.

Introduction

The heart and soul of the schools which have survived over the decades has been the department and the personnel who maintain everyday contact with students: the Student Services Department.

A bookstore selling self-improvement books completes its obligation to you when your money enters the till (or the credit card approval comes through). Unlike a bookstore, your relationship with an enrolled home study student has just begun with the initial shipment of "books" and materials. The service to which ev-

ery student is entitled to over the enrollment term plays a important role in student retention, course completion rates, customer satisfaction and revenue earned.

In this chapter you will be given a list of objectives or tasks that need to be accomplished no matter the size of your student body or staff. In history form follows function. After we have answered "what" needs to be accomplished, we will cover the "how to part" with some consideration to staffing a service department.

What is the Service Department's Mission?

If you were to review the examiner's rating form that is used for the evaluation of schools during the NHSC's accreditation process, you would find that there are three overall objectives of the department.

First, the service department provides an ongoing day in and day out processing of exam papers or projects. Processing includes grading responses, evaluating and commenting on results, recording scores, and providing additional exams, study kits and supplies. Communications is also a key component here, including responding to student inquiries, to instructors, etc.

Second, the service department has the overall responsibility for the perpetual retention of student records. While there is no requirement to retain every form of student/school communications, you must retain appropriate student records for review by students, selected employees, and those representing regulatory or accreditation agencies.

A third area of concentration, not applicable to all schools, is the provision of employment and counseling services to both currently enrolled students and graduates. Schools offering courses in specific vocational fields will need to allocate resources to make sure that success and satisfaction can be documented for students expecting to receive job guidance after graduation.

"Service after the sale" is the cornerstone of any school. Here are some of the tasks necessary to help fulfill your promise of a complete educational experience for the student.

Student Services Department Functions

Communication Services

There is an axiom in the home study business that every school staff member should take a home study course to get an appreciation of what a student goes through as a student and what he or she expects in service from a school.

Even though the traditional classroom and teacher is missing, students still crave for communication from their teachers and their "school." How would you feel if all you did was drop an exam in the mail, wait for your grades and not be able to talk with any live people at the school you attend? It doesn't sound very inviting, does it? Keeping that in mind, here are a list of tasks that you need to accomplish under the banner of Communication Services:

Receiving Exams

Of course it seems obvious, but every working day, a school must have staff on duty to make sure that each and every student test paper is accounted for, graded, and properly routed through your system. It's so obvious that we can take this task for granted—until a flood of student complaints about missing exams starts coming in!

How are tests going to be submitted for grading? The traditional technique of pre-printed exam mailed in for grading is just that, traditional. Today, that "paper" can be faxed, transported by an overnight service, or even dropped off in person at the school!

For schools catering to a student body with computers and communications devices, tests can be taken electronically without paper being exchanged on either end of the telephone line. One way or another, you have to "capture" that test and account for it. Here are some tips for handling tests:

1. Mailed in exams are probably the easiest to handle. Designate a person to receive all incoming exams and be responsible for creating a daily record showing receipt of all exams by student name or number. Tests should remain in their envelopes until the receiver can accurately ascertain who the test is from, if there are any address changes, etc.

2. If given the chance, many students with access to a fax machine might want to transmit their exams via this method. They are making an investment in telephone time and charges with the expectation of quicker turnaround time. They like fast food and fast test scores. Your role is to set up a system to receive these exams. Why not dedicate a specific "student test fax number" and have the fax machine monitored by the person who normally handles incoming mailed tests?

3. Be careful with fax transmissions routed directly to a computer by external fax modems or electronic mail service. Indeed, it would be great for a grader to log on to a computer and pull up a file containing all incoming tests for grading. Your problem is one of control and accountability. How do you know how many tests came into your system and for which graders, and how can you monitor their performance? Certainly, it can be done, but with a lot of thought.

4. For some students, immediate service on their submitted exams is of supreme importance. You will also have students in foreign countries who have limited faith in their nation's postal service. For these cases, design a system to account for exams received by overnight mail services such as Federal Express, Airborne, DHL, United Parcel Service, etc.

Exam Turnaround Time

Few in number are the students who would hand a test paper into a teacher and be satisfied with a score two or three weeks later. Your students deserve prompt and accurate grading of exams and transmittal of grades to them in the shortest time possible.

A traditional rule of thumb for schools was to have 24 to 48 hours in-house turn around time for tests. For example, exams received on Monday should be graded and scores transmitted to the student by no later than Wednesday. Electronic transmission of exams by fax or computer have resulted in an expectation of "right now" grading and posting of results to anxious students hungry for positive feedback.

Grading Methods

How you will grade exams will of course depend on the type of exam constructed by the course authors. Your responsibility is to

see that the exam is graded promptly, accurately, and consistently at a cost per exam appropriate for your course.

Some tests can be constructed so that answer sheets can be electronically scanned and scored, grades are posted to a daily "tests received" file in a computer. Other exams will need to be physically graded with answer keys by either graders or qualified instructors. Not to be forgotten are special types of tests such as photographs, art work, designs, etc.

Don't overlook the expectations of the student in exam grading. If, for example, you are advertising that exams for a medical examiner's course are going to be graded by a licensed medical pathologist, then you better be prepared to fulfill that promise!

Control of Exams

As suggested earlier, school staff need to put themselves into the shoes of the customer (student). There is nothing more distressing than to take the phone call of a student who swears that the test was submitted by mail (or fax) and that your school must have dropped the ball and lost it somewhere.

You can't control how the U.S. Postal Service handles the mail, nor can you control the lines of telephone or satellite communications. You can, however, insist that each staff member treat every exam as if it were their most important personal document.

Stress to course developers the importance of reminding students that they should retain a copy of their test answers "just in case" of transmittal failure. Beyond that, set up controls to:

1. Log by student number as "received" each test that comes in.

2. Forward tests to specific graders (or instructors).

3. Have graders sign for the incoming tests.

4. Graders must agree to a turnaround time based on test volume.

5. Exams should be reviewed by qualified instructors, with commentary as appropriate.

6. Instructors or supervisors must monitor grader performance.

7. Exams need to be collected for posting to student records.

8. Transmit scores back to students promptly and in a manner similar to their transmittal to you—e.g. mail for mail, fax for fax, etc.

9. Except in the smallest school, no one person should receive, grade and record test scores—a check and balance system is useful here.

Handling Student Inquiries

Promise that each student inquiry will be handled with as much expertise and care as you would a test paper or tuition payment.

All incoming student inquiries should be directed to the student service department. Students have already been sold on your product, but their inquiry is an excellent customer service opportunity. You can make a positive impression and show them what a good decision they made enrolling in your school.

Student inquiries need to be handled by experienced staff who have the power to provide answers and solutions without having to refer the student from department to department.

An optimal system would provide a computer based system that logs all incoming inquiries and checks their disposition status. By reviewing this log periodically, a supervisor can spot trends and problems. Tracking requests for course materials, test scores and the like is relatively easy.

More difficult are the numerous calls intended for course instructors. Develop a system that can categorize the calls by course and type of call and be able to report their disposition to a student service supervisor. Often overlooked, instructors retain a substantial knowledge of the good, the bad and the ugly of your course materials. A good student inquiry tracking system should allow course developers to call up on the computer a file of all comments pertinent to future course development or revision.

Course Materials

Rare is the school that sends a student 100% of the study and test materials for a course in the initial shipment. Most schools send out study "modules or learning kits based on course completion and/or tuition payment. It is up to the student services department to assure that a sufficient quantities of all course supplies are available for prompt shipment.

Adequate inventories must be maintained based on the expected enrollment volumes, the number of active students, and the amount of time anticipated for re-ordering. When student progress through the course triggers a request for another module shipment, that shipment needs to go out with the same dispatch as a corrected test or invoice payment.

One of the keys to maintaining student progress in a course is to make sure the student can keep studying once the first lesson is begun. Any and all obstructions to study must be minimized, including the non-availability of study modules. From the financial standpoint, the non-studying student is a non-paying student, so don't let a late shipment be the reason your student stopped studying. Likewise, student complaints about lack of study materials are expensive to handle and usually avoidable.

Don't underestimate the potential problems in this area. Even experienced student services veterans run into inventory difficulty. You need to maintain a close relationship with the course development department and establish inventory re-order times that will allow for revision and reprinting of each course, no matter how extensive the revisions might be.

Mailroom Services

Control of the mailroom operation (including shipping and receiving) may lie with any number of school departments because of it's a natural "overhead" position in every school. Here are some tips for you to consider to maximize your mailroom and other communications efforts:

1. Stress the importance of early receipt of incoming mail. If necessary, avoid delivery by the route carrier by purchasing a "caller box" service from the Postal Service that allows your staff to pick up mail as early as 7:30 am. Why not join your lo-

cal Postal Service Council? Also, invite your Postal Customer Service Representative to your office occasionally.

2. Work closely with the Postal Service and express shipment carriers to get the latest possible pickup times for outgoing communications. Most carriers are flexible, customer-oriented companies.

3. Minimize the use of express mail services by emphasizing the prompt and efficient handling of student communications within the organization.

4. Encourage facsimile and computer to computer transmissions during the night hours to take advantage of lower telephone rates and to keep your telephone lines available for incoming daytime calls.

5. Establish a consistent and reliable pattern of communications with your students. School newsletters and periodic bulletins are great devices to keep everyone informed. It's not a bad idea to tell them in the course materials what your service standards are. Make sure they have a means to let you know if your published standards are not being met!

Records Services

Students of any school have the expectation that you will maintain accurate records of their achievements for time in memorium. Our focus here will be those records that are likely to be generated within the student service department. Here are some considerations you can use in designing your system:

- **Incoming Tests.** Be able to track each test as it comes in, where it went in the building and when it was returned to the student.

- **Student Inquiries.** Track student communications, no matter how they come in. Develop categories so you can spot trends and troubles.

- **Course Materials.** Be able to track all course shipments, including notes for back ordered materials, replacement textbooks, etc.

- **Exam Grades.** Provide for the prompt recording of test scores. For any given time, your system must be able to account for each test submitted for grading.

- **Test Failures.** Students who do not pass an exam frequently require special attention in the form of detailed analysis of their work, retaking of exams, personal phone calls, etc. This can be an important file for course developers to spot text or course problems.

- **Test Item Analysis.** Make provisions to track the error rate on questions for each test. This is especially important for all newly published test papers.

- **Turnaround Time.** Assuming you have announced performance standards for your staff, you need a means of assessing that. Track your volume of exams received for each day of the week. Then, compute your average time to turn tests around.

- **Completion Rates.** At least once a year, you should conduct formal completion rate tests for each course offering. Closely monitor the non-start, test completion and course graduation rates.

- **Record Retention.** Plan for permanent retention of all relevant student records, including grades, financial transactions, requests for service, enrollment applications, any pre-enrollment test results, job placement and counseling assistance. Accrediting Commission standards require schools to retain "academic transcripts" for an indefinite period. Schools should be able to provide a usable transcript for an alumnus a half century from now.

- **Records Security.** Permanent student records need to be available for current use, but need also to be protected in fireproof files. Consider a system of permissions and sign in/sign out procedures to track open files. Computer files should be adequately backed up on kept off site and a system of permissions installed to control access. A few years ago a small home study school had its computer files destroyed in arson's fire. Happily, the school was able to reconstruct all of its files using an off site back up record.

The record services function of the student service department is relied upon by students and other employees. It is a function that requires constant monitoring to insure records are maintained in an accurate and consistent manner.

Counseling and Employment Services

Schools offering vocationally oriented programs should give careful consideration to the amount and quality of counseling and employment services available to current and graduate students.

Counseling is generally considered to be the preparation of students for entrance into the job market for which they are studying. For example, a motel/hotel school will develop materials or class segments giving the students a clear understanding of the potential openings in the industry and how best to apply for them.

Employment assistance is not quite as common, but it can become an important asset for a school. Staying with the example of the motel/hotel school, a school with a dedicated employment service could offer placement directly into the industry and could be viewed within the industry as a provider of high quality employees.

As a school operator, however, you need to guard against a counseling service that consists primarily of accounting department collection representatives calling to increase school payments. This is a collection service, not a bona fide student counseling operation. Here are some other considerations for your review:

- **School Newsletter.** Some schools find that a periodic newsletter to current and graduate students helps to foster a sense of community among all those who have used the school's services. A newsletter can be an important vehicle to keep track of the movements of your graduates, which will be especially important if you are trying to track job placement statistics or market future courses. It's an excellent source of student referrals.

- **Placement Statistics.** To make any claims about the employability of your graduates, you will need job placement statistics. Develop a system that tracks those students who are

taking your courses for the purpose of gaining employment in a related field.

- **Placement Guarantees.** Avoid any representation of job placement guarantees. If you have an employment service, make sure all potential and current students are given literature that clearly states how such a service operates and what the statistics are for placement.

Clearly, counseling and employment services need to be tailored to your school's student population. Student success and satisfaction are paramount to your long term success, so be sure you have designed the means for obtaining and assessing this information.

Student Services Department Structures

General Overview

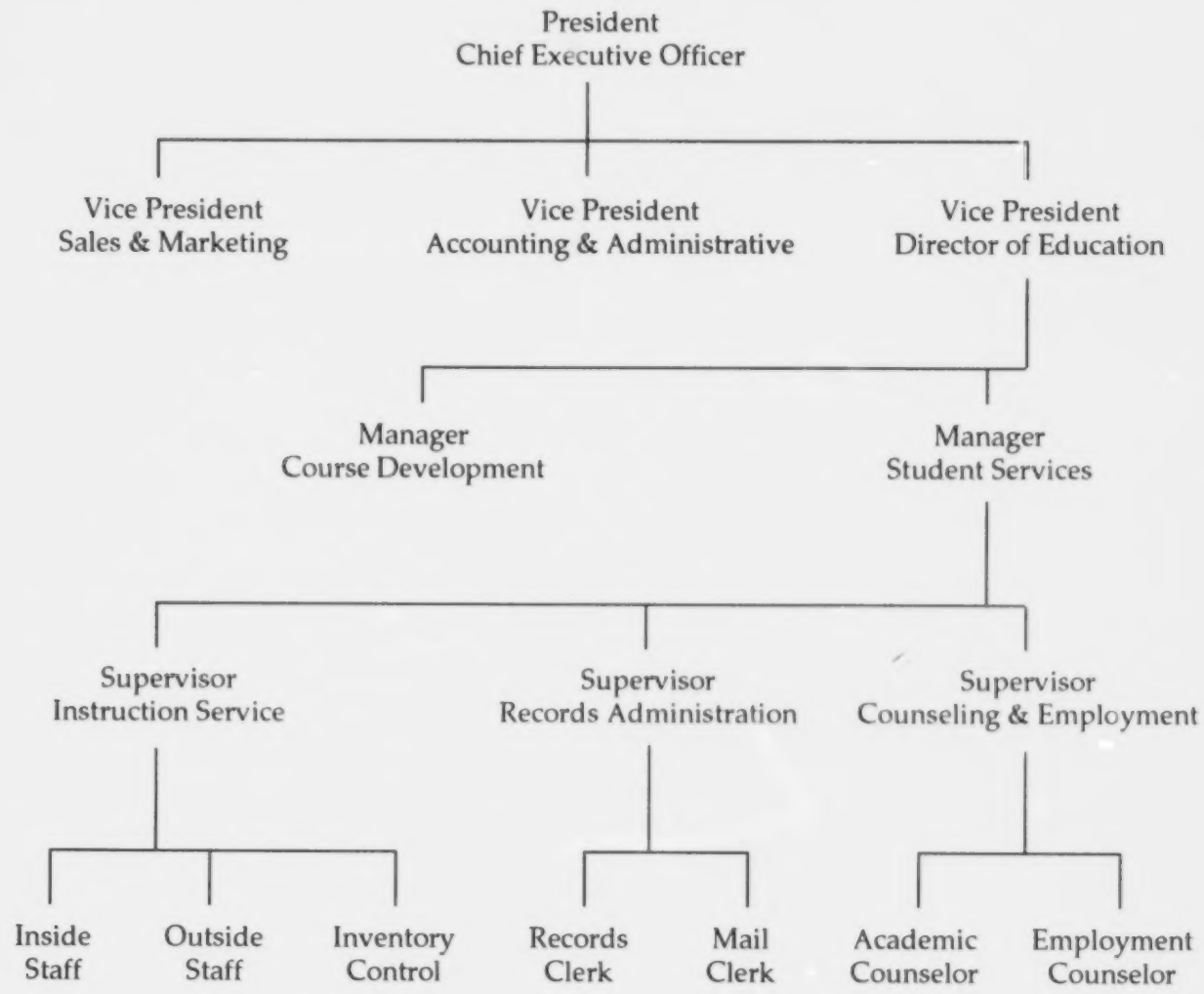
When plotting out the organizational structure, there is a tendency to start filling in rectangles on a chart before developing a clear understanding of the functions that are truly needed. This is why most of this chapter dealt with the descriptions of tasks commonly undertaken by the student services department.

Within the school organization, student services are typically placed under the control of the Director of Education (Vice President), who reports directly to the President. Other major work groupings in a school would include Sales and Marketing as well as Accounting and Administration, each of which are headed by a Vice President.

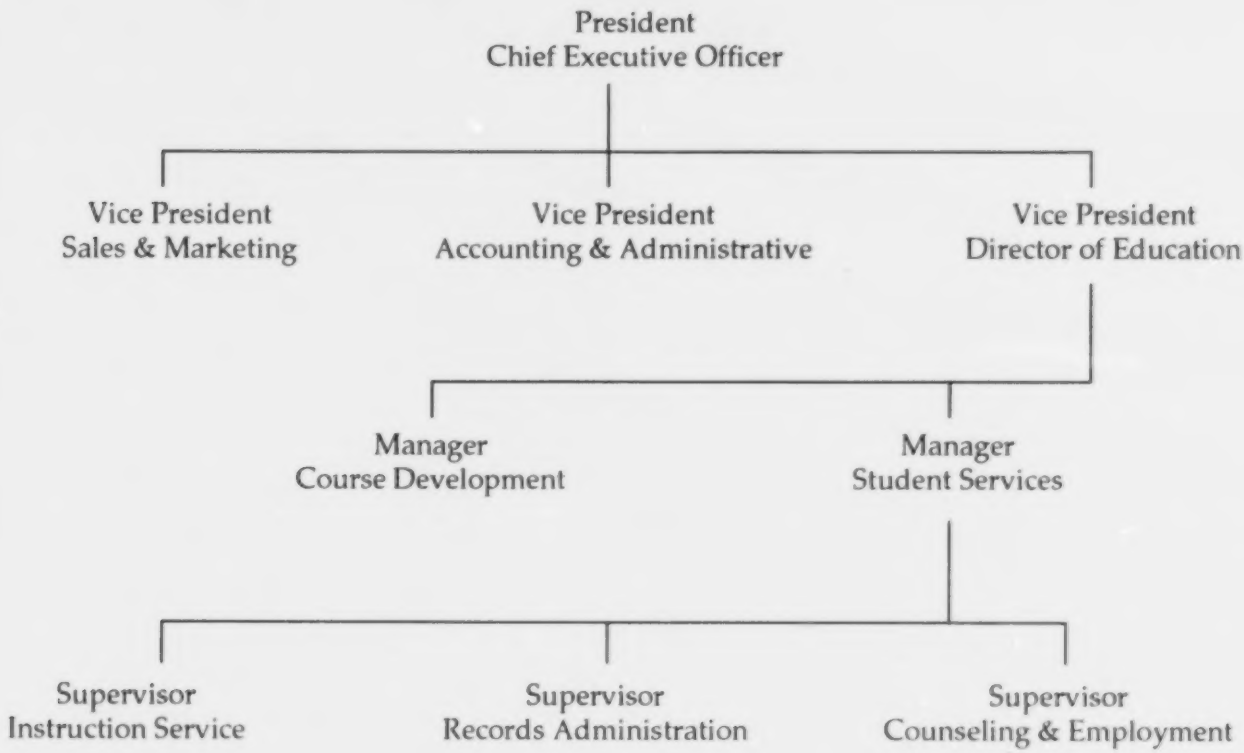
In some organizations, significant elements of the student services department will be split out and assigned to an Administrative section. These could include records services and mailing and shipping services. This splitting of responsibilities for student service should be avoided if at all possible. Your Director of Education should be the person responsible for all the services required by students from when they are enrolled until they graduate—and beyond.

The sample organization charts below illustrate the student service functions for small and larger schools. What if you have only five employees? Once again, the functions do not change, only the

Large Organization Student Services Department



Small Organization Student Services Department



personnel responsible for accomplishing them.

In conclusion, this chapter outlines some of the basic elements of the student services department. Of course, it is expanded or contracted according to needs and volume of the school.

Summary

While the successful home study student is frequently a motivated self-starter, this does not mean that the student can survive in an learning environment which lacks good student service.

From the time the initial study materials are shipped right up until the certificate of completion is mailed, the ability of many students to complete a course depends on the dedication and competence of the personnel in the student services department.

Students are looking for accurate, timely, and consistent service. Of course, these are the elements of any total quality management program. As part of that commitment to excellence, the manner in which student service staff executes its mission says an enormous amount about your school.

Chapter Four

Supervising Instructional Staff

by
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The Author

Mary E. McKeown has served on the staff of American School, Chicago, Illinois for more than 50 years. She has conducted in-service training programs, written study guides, and developed new curriculum materials.

Mary has spoken at numerous NHSC Conferences and Workshops on various subjects related to the home study field. She has also served on a committee to review the policies and standards for special function schools for the North Central Association of Colleges and Schools.

A recipient of the NHSC Distinguished Service Award in 1990, she has been the Chairman of the NHSC Research and Educational Committee since 1988.

Introduction

Despite all the computers and other technological miracles that we have become accustomed to in our life today, the human factor is ***still*** the most important one. This is particularly true in a home study school. Students expect a well-qualified staff which will answer their particular questions, supply the study material when it is needed and guide them through the course.

To ensure that your school has a staff that will meet these criteria, it is helpful to keep in mind three major principles:

The first idea to keep in mind is that you want to hire the right person for the right job. Then try to make that person as valuable to the school as his or her abilities will allow. Third, keep the employee satisfied.

Hiring—Getting the Right Person for Each Position

Getting the right person for the job requires an understanding of the job itself and the skills required to handle it. Before you advertise, make a list of the skills and qualities needed. Then keep these in mind as you interview prospective employees.

Decide whether the position is to be full-time or part-time. Today, no school needs to be organized along the traditional nine-to-five workday. You can be creative in setting up your workday. Consider flex-time and part-time, as well as full-time scheduling depending upon what is needed.

Schools often find that they do not need full-time people for certain jobs. For example, a school many not have enough volume in a certain area to merit hiring a full-time instructor. It is possible to get a person who has the qualifications for the job and who is willing to work part-time. In the academic area you will find that teachers often welcome the chance to work part-time. Other sources of part-time staff are retired teachers, mothers (or fathers) who wish to work at home while their children are young, and graduate students.

If your school is offering courses in a specific business field, look to businesses or industries in your community for possible part-timers. You may get a bonus because such people are usually up-to-date in their fields and can add practical expertise to your program.

One of the first steps in acquiring the necessary staff is to acquaint yourself with federal and state laws regarding hiring. Most people are familiar with the Civil Rights Act of 1964 which prohibits discrimination in hiring because of race, color, religion, sex or national origin. Subsequent laws prohibit discrimination on the basis of age, marital status, or handicap. In many states there are also laws against discrimination due to sexual preference. (An excellent reference is *Employment Law: A Checklist* published by the U.S. Chamber of Commerce. Send $16.95 payable to U.S. Chamber of Commerce, 1615 H Street, NW, Washington, D.C. 20062.)

Questions that would elicit the information listed above should not be on application forms nor should the interviewer ask them. To do so risks being accused of not complying with the law.

Many states and accrediting associations have regulations or minimum standards concerning the qualifications of instructors. These usually involve academic training and/or practical experience. Be sure that those you hire have the necessary background to meet these requirements. On the application form there should be a statement for prospective employees to sign giving you permission to check their educational background and to contact former employers and character references.

Before you interview a prospective employee, take the time to look over the application carefully and make notes as to what additional questions you wish to ask.

Because it may take time to get college transcripts in order to verify a person's educational background, you may want to hire a person on a trial basis for a month or two. Have a statement to this effect on your employment application.

Most organizations today have Personnel Handbooks which define clearly the benefits, policies on absences, sick leaves, vacations, promotions, health insurance, paid holidays, qualifications for pensions, etc. If a handbook is available, it should be given to new employees at the time they are hired. If your school does not have such a handbook, you can develop one using guides furnished by the American Management Association or similar organizations.

What you have to pay your staff will depend upon what the going wage in your area is for each job you need to fill. To get information as to average salaries in your area by job classification, contact your local or state Chamber of Commerce or your local or state employment office.

It is unwise to go much below the prevailing wage. Hiring at a low salary can backfire on you. In the end it may actually cause you to spend more money because you will have to hire two people to do the job of one or your turnover will be great requiring you to spend time and money training the next person to do the job.

When a new staff member is hired, it is customary to let her or him know when they can expect a salary review to take place—at the end of three or six months, for example, and every year thereafter. It is also wise to let the new employee know on what basis he will be judged. If you have a rating sheet, give new people one at the time they are hired so they will know what you consider important.

Helping Employees Grow in the Job

In any organization it is important to train new employees carefully. Take time to make certain that new employees, whatever their job classification, know what the school's purposes are and how they can help carry them out. The switchboard operator should know that the way she or he answers the phone contributes to the overall impressions students or prospective students have of the school. The shipping clerk should know that prompt mailing and shipping are necessary to the success of the school. Instructors and other student service personnel should be made aware of what their motivating comments mean to the student studying alone. Instructors and course writers should be made aware of the demographics of the student body. They need to know the educational background, age, sex, etc., of the school's typical student.

Give new instructors time to become familiar with the textbooks and other course materials that are used in the course or courses they will be teaching. You will also want to familiarize instructors and course writers with some of the unique challenges of teaching by correspondence. They should be told that all the necessary material for the students to master the course must be in the information the school supplies to the student. The importance of writing motivating comments on each examination or assignment should be emphasized.

It is a good idea to put together an Instructor's Manual which will help both the trainer and the new instructor learn and remember school policy.

You will also need to go over each new instructor's work for some time after hiring. As the instructor gains experience, less time will be needed to check his or her work but there should be a periodic review of all instructors' work. The basis of the review should be known to the instructor. The review should be approached as a

way of improving the instructor's work rather than criticizing it.

What has been said about training the instructional staff can be said of training the entire staff. Large schools may want to have a written description for each job and make sure that each employee has a copy.

It is important to keep all staff members motivated. Reward teamwork and cooperation. Encourage a climate of openness. Strive to have employees feel comfortable so that they can express their ideas freely. Share with the staff any letters you get telling how well graduates have done. The correspondence school instructor does not get the face-to-face contact that classroom teachers get. They do not get the instant, daily feedback from students that classroom teachers enjoy.

Just as it is important to keep up the morale of an organization by acknowledging good work, it is important to take action when problems arise . . . and they will! In the best organizations, disagreements between staff members will arise or a worker may not do a proper job, may come late, or have excess absences. If you do not act decisively, morale will suffer. Others will decide that they, too, should be allowed to "break the rules."

First, talk to the offender. See if there is a reason for the behavior and explain that he or she must conform. If two people cannot get along, talk to both of them. You may have to transfer one to another department.

Point out to the person who comes to work late that it is not fair to his/her co-workers for him/her to come late. If this does not work, dock the employee and if he/she still persists, you may have to ask the employee to leave. In any case make sure you are fair and give sufficient warning before firing anyone. Keep a record of complaints and give a copy to the employee. Then you will have evidence that you gave him/her a chance to mend his/her ways.

In summary, keep in mind that the goal is to attract, train and maintain a staff that has the same goals the school has and that the most important person in any school is the student whose needs come first.

Keeping the Staff Motivated

Keep staff informed on changes that are taking place in the school. Just as a school newsletter can be used to motivate students, a staff newsletter can do the same for staff members. It can be used to introduce new employees, new school policies, and other important information you wish to communicate. This can be especially important when some instructors are "off campus." It can keep them feeling part of the organization.

Bulletin boards throughout the building can also be a source of keeping communications open. Executives and supervisors will find that an open door policy will improve morale and keep them in touch with the staff.

If you want to build a tradition of long staff tenure at your school, encourage your employees to develop in their jobs, take on new responsibilities, engage in professional development activities, take courses and learn new skills.

Encourage your staff to keep up with the latest discoveries in their fields. Technical magazines should be furnished by the school and time should be provided for the instructors and course developers to read them. Encourage people to attend NHSC Education Directors Seminars and Workshops and other educational meetings that will keep them up-to-date in home study. If only one or two people can attend an important meeting, whoever attends should write a summary of the meeting and distribute it to the others. Some conferences make tapes or videos of important sessions. These can be shared with all instructors who are interested.

Regular staff meetings can be used to encourage staff to express their ideas. Such ideas often are the means of improving the school's operation.

Probably one of the most important techniques of motivating your staff is to reward those who exhibit ability with more responsibility and increased reimbursement.

Building and retaining a top-notch instructional staff are not easy tasks. You will need resourcefulness, an understanding of human nature, a sense of humor, and the ability to motivate people to do their best. But you will find the rewards are many, both to your institution and to yourself.

Performance and Rating Report

Name: _____ Dept: _____ Date: _____

Job Classification: _____ Labor Grade: _____

Present Salary: _____ Supervisor: _____

Important: Place a check (✔) in the box of each work trait below description which most nearly coincides with your opinion of the employee. Consider one trait at a time. Don't let your judgment concerning one trait influence your judgment of other traits. If you desire to explain or qualify some of your judgments, do so in the space under General Remarks. Rate for the full period, rather than on specific incidents.

Factor	1	2	3	4	Change since last report, or since he/she worked for you. Check One: Regressed	No Change	Has Improved	Continued Good Work
1. **Quality:** Consider accuracy, neatness, ability to detect errors by checking own work.	Below minimum requirements. ❒	Normally meets basic requirements. ❒	Frequently exceeds basic requirements. ❒	Always exceeds basic requirements. ❒	❒	❒	❒	❒
2. **Quantity:** Consider output of work.	Does not meet minimum requirements. ❒	Normally meets minimum requirements. ❒	Frequently produces more than required. ❒	Always exceeds requirements. ❒	❒	❒	❒	❒
3. **Job Knowledge:** Consider present job classification and experience.	Inadequate knowledge for normal performance. ❒	Has sufficient knowledge to meet minimum requirements. ❒	More than average working knowledge of his/her own and related job. ❒	High degree of knowledge in all phases of his/her and related jobs. ❒	❒	❒	❒	❒
4. **Work Attitude:** Consider willingness to help; courtesy and enthusiasm.	Indifferent, sometimes causes friction, seldom works with or assists others. ❒	Acceptable, cooperative but on a limited scale, usually courteous. ❒	Cooperative, gets along well with others. Good team worker. ❒	Sets an example for others; shows leadership qualities. ❒	❒	❒	❒	❒
5. **Initiative:** Consider attentiveness, resourcefulness and creativeness.	Routine worker; does not make suggestions. ❒	Meets basic requirements; sometimes makes suggestions. ❒	Progressive, alert to opportunities for work improvement. Self-starter. ❒	Highly resourceful and alert to new methods of production. ❒	❒	❒	❒	❒
6. **Dependability:** Consider reliability in performing assigned work; dependability in following instructions.	Requires constant supervision; wastes time. ❒	Can be entrusted to do routine work with normal supervision. ❒	Steady worker; can be depended upon to complete assigned tasks with minimum supervision. ❒	Exceptional worker, justifies utmost confidence to complete all assignments. ❒	❒	❒	❒	❒

Performance Summary

Name: _____ Dept: _____ Date: _____

Job: _____ Supervisor: _____

Present Salary: _____ Recommended Salary: _____

1. Has the employee shown any outstanding accomplishments or abilities in performing his or her work? What are they?

2. Along what lines do you think employee needs improvement in his or her present job?

3. What is the employee doing at present to improve him or herself, such as attending school, studying at home, etc.?

4. What are your suggestions for helping him or her improve in present job? For future jobs?

5. Is the employee doing work which fits his or her abilities? What should he or she be doing?

6. What are your general remarks concerning the employee's performance of his or her duties?

Indicate (✔) the additional information below only if employee is in the learning state of his or her job.

Employee is:

- ❒ newly hired
- ❒ newly hired, but experienced
- ❒ new to job through upgrading
- ❒ transferred from similar job in company
- ❒ rehired to old job
- ❒ other (specify)

Evaluation of Trainee performance: Considering the length of time on the job, what progress has he or she shown?(Check (✔) only one)

- ❒ progress not satisfactory
- ❒ progressing, but not as rapidly as desired
- ❒ making good progress
- ❒ progressing very rapidly
- ❒ doing exceptionally well: outstanding rate of development

Chapter Five

The Record Keeping Function

by
Dorothy M. Bascom
Director of Admissions and Registrar
Home Study International

The Author

Dottie joined Home Study International eight years ago. As Director of Admissions and Registrar, she is in charge of enrollments, records and testing at HSI. HSI was founded in 1909 and offers home study courses for preschool, kindergarten, elementary grades, junior high, secondary, and college.

Dottie has a B.S. degree in Business Administration from Union College in Lincoln, Nebraska. She has also done some post-graduate work in Human Development at the University of Maryland, College Park, Maryland.

The Record Keeping Function

Record keeping involves the preservation of facts or information. However, identifying facts or information that need to be preserved is generally left to the organization and its governing body to decide.

Because National Home Study Council serves as an accrediting agency for a wide variety of schools, the records and types of forms that need to be used, and the information that needs to be retained, will vary.

The Accrediting Commission of the NHSC has established some general requirements for the retention of records. The following is a summary of those requirements:

1. First–time applicants for accreditation must have all of their operating records available for the past two years in order to show continuous sound and ethical operation for that period of time. For schools already accredited, a complete five–year record of school operations should be available for review by the visiting examining committee or the Accrediting Commission.

2. The Accrediting Commission standard for records protection is: "Educational records of all students are maintained in a safe, fireproof, and reasonably accessible place as long as they are likely to be needed. Other records are maintained in accordance with current educational, administrative, business, and legal practice."

   The Commission interprets this standard to mean the following: essential records of students are clear, complete, safe, and readily retrievable. A summary record on each student is kept permanently. It contains, as a minimum, the name, student number (if any), last address, basic education, date of enrollment, course, current academic achievement, and tuition status. This means that a graduate who requests a transcript of his/her work 10 or 20 years from now should be able to receive one from you promptly. Fire protection of records is critical, and off–premise retention of computerized duplicate records is the norm today.

3. The Commission's policy requires a school to maintain for a five–year period (see #1):

   a. a current list of the names and local addresses of all salesmen and their supervisors.

   b. student and public (i.e., agency) complaints and the resolutions maintained in a separate "complaint file" available for Accrediting Commission inspection.

   c. documentation that verifies any data which is included in the school's Self-Evaluation Report submitted to the Commission, including original source financial records, stu-

dent surveys, raw course completion data, etc. For other legal requirements for the maintaining and retention of school records for other entities such as the IRS and State Department of Education, etc., you will need to seek the advice of your legal counsel, state regulator, or others to obtain the customized guidance you might need.

As an example for State requirements, Maryland asks that the following information be kept for each student for each year of enrollment:

a. Student's first and last names

b. Student's date of birth

c. Student's home address

d. Credits and grades earned in each subject area

e. Code for the meaning of the grading system

f. Transfer credits accepted by the school

g. Month and year student initially entered

h. Month and year student withdrew or graduated

i. Student's daily attendance, where applicable

In addition to planning what records need to be kept, a system needs to be in place to assure that the records are safe. Fireproof or fire resistant storage cabinets or vaults should be provided. Records that are maintained on computer tapes or disks should have back up tapes made frequently. Back up tapes should be stored securely in a separate location.

Samples of a few forms are given that might be used in your record keeping.

Figures

1. Form for gathering information regarding a prospective student

2. Attendance record for elementary student

3. Elementary evaluation form, showing grades and comments for a particular period

4. Complete report card for Grade 3

5. Instrument used by teacher to record student's grades. Information taken from this form and put on computer for student

6. Grade card kept by teachers for individual students

7. Form used by teachers to indicate final grade to be given for course

8. Grade Report sent to student

9. Hard copy of permanent academic record kept on file for student

10. Diploma Work Sheet used for evaluating high school transcripts

Figure 1

PROSPECTIVE STUDENT
Interested in Attending 199__-9__

Today's date:_____ Planning to enroll:_____

Name:_____ Information Sent

Address:_____ Bulletin:_____

_____ Application:____
City State Zip

Brochure:_____

Phone-Home: (____)____-_____ State Reg:_____

Phone-Work: (____)____-_____ HSLDA Bro:_____

Best time to contact:_____ Other:_____

Student's Name:_____Gr_____ _____

_____Gr_____

_____Gr_____

Number of children:_____

How did they hear about HSI:_____

Comments:_____

_____

_____

Follow up:

1.Date _____ Status:_____

Comments:_____

Follow up:_____

2.Date _____ Status:_____

Comments:_____

Follow up:_____

3.Date _____ Status:_____

Comments:_____

Follow up:_____

Enrolled _____ Future _____ Inactive _____

Figure 2

Elementary

Home Study International
ATTENDANCE REPORT

Student John Rivers Grade 3 Period 4

Student No. 96254 Home Teacher Mary Rivers

Home School Address 2964 Summer Place

Orson, ID 55555

Dates in Session (mo./day/yr.)	Hours in Session or Absences*	Dates in Session (mo./day/yr.)	Hours in Session or Absences*
3/1/89	6	3/28/89	5
2	4	29	4
3	3½	30	4½
6	5	31	5
7	4	4/3/89	4
8	4½	4	5
9	3	5	4
10	3	6	6
13	6	7	absent
14	4	10	6
15	4½	11	5
16	3½	12	6
17	3	13	4
20	5	14	4½
21	6		
22	6		
23	absent		
24	absent		
27	absent		

*Explain absences here Spring break 3/23-27/89
illness 4/7/89

Special events this period field trip to museum on 3/13/89

Comments

NOTES: (1) Mail this report to HSI with period tests.
(2) Report for each student separately.

Figure 3

HOME STUDY INTERNATIONAL
Elementary Evaluation Form

DATE: February 18, 1993

STUDENT: Jane Doe

GRADE: 3 PERIOD: III

Jane's grades for this period are as follows:

Art	A
Bible	A
Handwriting	B
Health/Science	A
Language	A
Math	A-
Music	B-
Reading	A
Social Studies	B
Spelling	A

COMMENTS OR SUGGESTIONS:

Jane has completed the first semester of the third grade. She should have no trouble finishing before her August 2 deadline; however, you probably want to finish well before that time so she can enjoy a summer break.

Jane did an outstanding job on the enclosed tests, showing improvement in art and Bible. She seems to grasp concepts quickly and thoroughly. You and Jane are doing all the right things, so keep up the good work.

Even though Jane did well, review carefully each missed item on these tests as this may help her from making the same type of mistakes in the future. Spend time daily drilling on the basic multiplication facts until Jane has them memorized.

Write two sentences each day that contain several errors (capital letters, punctuation, grammar, spelling, etc.) Have Jane find the errors and rewrite the sentences correctly. This should help her find errors in her own work.

All the best as you continue in your home school.

Bonnie D. Perkins, M.A.T.
K-8 Supervisor

Figure 4

GRADE REPORT

Home Study Elementary School
Home Study High School
Founded 1909
Division of Home Study International

MAILING ADDRESS
P.O. Box 4437
Silver Spring, MD 20914-4437 USA

HEADQUARTERS
12501 Old Columbia Pike
Silver Spring, MD 20904 USA

Jane Doe
3918 Mount Zion Rd.
Glacier, MT 38745

DATE: February 18, 1993

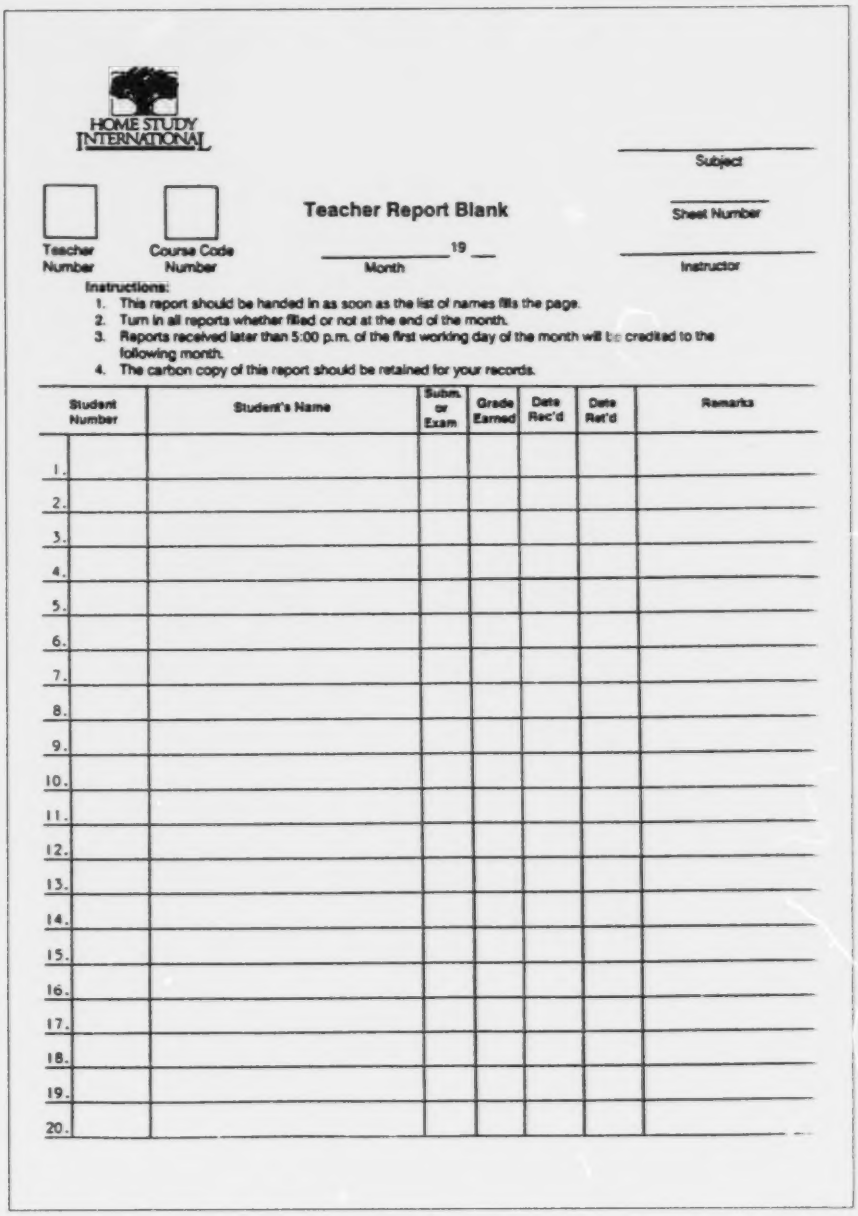
STUDENT NUMBER: 79462

COURSE NUMBER	COURSE TITLE	1	2	3	4	5	6	DATE COMPLETED
	Grade 3 Art	C	A	B	A	A	A	2-18-93
	Grade 3 Handwriting	B	B	B	B	B	B	2-18-93
	Grade 3 Health/Science	D	C	B	A	B	C	2-18-93
	Grade 3 Language	A	A	A	A	A	A	2-18-93
	Grade 3 Math	C	C	C	B	B	C	2-18-93
	Grade 3 Music	A	A	A	A	A	A	2-18-93
	Grade 3 Physical Education	S	S	S	S	S	S	2-18-93
	Grade 3 Reading	C	B	B	B	B	A	2-18-93
	Grade 3 Social Studies	D	C	C	C	C	C	2-18-93
	Grade 3 Spelling	B	B	B	B	B	B	2-18-93
	Student promoted to Grade 4.							

Accredited by the Accrediting Commission of the National Home Study Council and approved by the State of Maryland

SEM - Semester
GRD - Final Grade
CRD - Credit (Secondary is in units)
P1-P6 - Elementary Period Grades
MT - Midterm Exam Grade
ST - Semester Exam Grade

Figure 5



HOME STUDY INTERNATIONAL

Subject

Sheet Number

Teacher Number

Course Code Number

Teacher Report Blank

_____ 19 __

Month

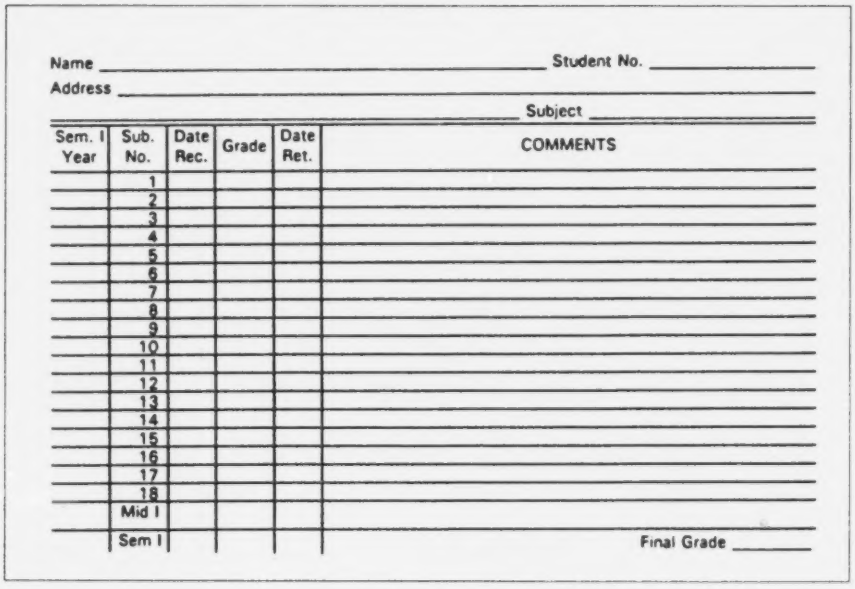
Instructor

Instructions:

1. This report should be handed in as soon as the list of names fills the page.
2. Turn in all reports whether filled or not at the end of the month.
3. Reports received later than 5:00 p.m. of the first working day of the month will be credited to the following month.
4. The carbon copy of this report should be retained for your records.

	Student Number	Student's Name	Subm. or Exam	Grade Earned	Date Rec'd	Date Ret'd	Remarks
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							
13.							
14.							
15.							
16.							
17.							
18.							
19.							
20.							

Figure 6



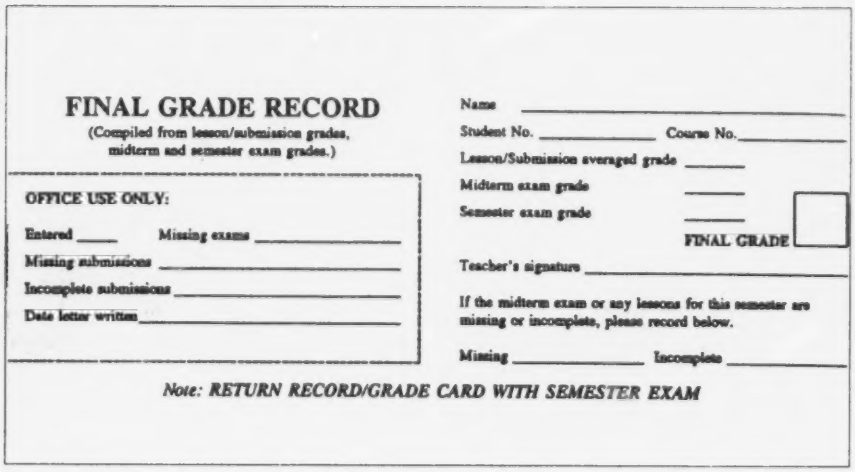
Name _____ Student No. _____

Address _____

_____ Subject _____

Sem. I Year	Sub. No.	Date Rec.	Grade	Date Ret.	COMMENTS
	1				
	2				
	3				
	4				
	5				
	6				
	7				
	8				
	9				
	10				
	11				
	12				
	13				
	14				
	15				
	16				
	17				
	18				
	Mid I				
	Sem I				Final Grade _____

Figure 7



FINAL GRADE RECORD

(Compiled from lesson/submission grades, midterm and semester exam grades.)

OFFICE USE ONLY:

Entered ____ Missing exams _____

Missing submissions _____

Incomplete submissions _____

Date letter written _____

Name _____

Student No. _____ Course No. _____

Lesson/Submission averaged grade _____

Midterm exam grade _____

Semester exam grade _____

FINAL GRADE

Teacher's signature _____

If the midterm exam or any lessons for this semester are missing or incomplete, please record below.

Missing _____ Incomplete _____

Note: RETURN RECORD/GRADE CARD WITH SEMESTER EXAM

Figure 8

GRADE REPORT

Home Study Elementary School
Home Study High School
Founded 1909
Divisions of Home Study International

MAILING ADDRESS
P.O. Box 6437
Silver Spring, MD 20916-6437 USA

HEADQUARTERS
12501 Old Columbia Pike
Silver Spring, MD 20904 USA

John Doe
Some Place
U.S.A.

DATE: 2/24/93

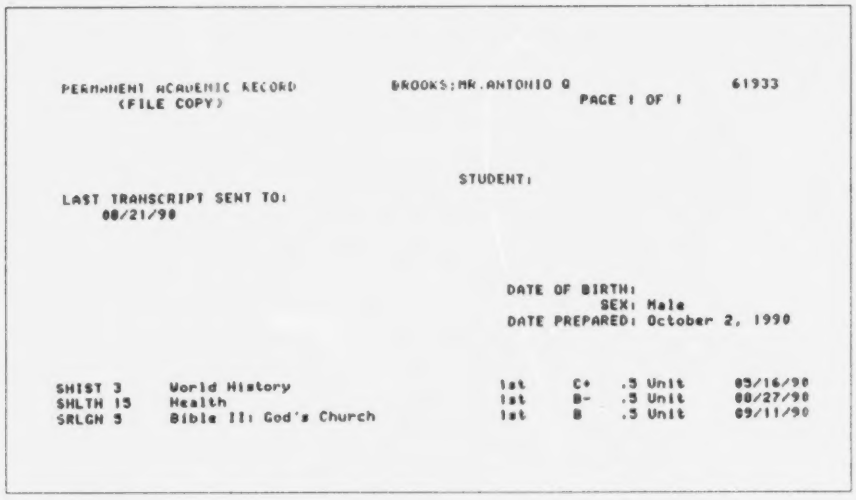
STUDENT NUMBER: 73211

COURSE NUMBER	COURSE TITLE	MT	ST				CRD	DATE COMPLETED
SENGL 1	English I	B+					.5	2/19/93
SHIST 3	World History		A				.5	2/19/93

Accredited by the Accrediting Commission of the National Home Study Council and approved by the State of Maryland

SEM - Semester
GRD - Final Grade
CRD - Credit (Secondary is in units)
P1-P6 - Elementary Period Grades
MT - Midterm Exam Grade
ST - Semester Exam Grade

Figure 9



PERMANENT ACADEMIC RECORD
(FILE COPY)

BROOKS;MR.ANTONIO Q 61933
PAGE 1 OF 1

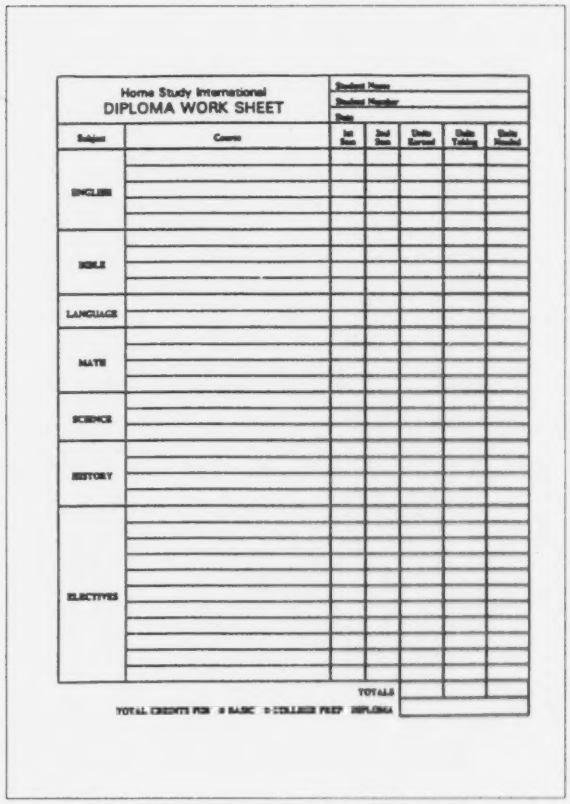
STUDENT:

LAST TRANSCRIPT SENT TO:
08/21/90

DATE OF BIRTH:
SEX: Male
DATE PREPARED: October 2, 1990

SHIST 3	World History	1st	C+	.5 Unit	05/16/90
SHLTH 15	Health	1st	B-	.5 Unit	08/27/90
SRLGN 5	Bible II: God's Church	1st	B	.5 Unit	09/11/90

Figure 10



Home Study International
DIPLOMA WORK SHEET

Student Name
Student Number
Date

Subject	Course	1st Sem	2nd Sem	Units Earned	Units Taking	Units Needed
ENGLISH						
BIBLE						
LANGUAGE						
MATH						
SCIENCE						
HISTORY						
ELECTIVES						
				TOTALS		

TOTAL CREDITS FOR A BASIC B COLLEGE PREP DIPLOMA

Chapter Six

Communicating to Your Students

by
Glenn C. Hoyle, Ph.D.
Director of Education
Art Instruction Schools

The Author

Glenn joined AIS in 1990 as Assistant Director of Education/Director of Research. He received his B.A. degree in English Literature from California State University, Fresno, and his Masters and Ph.D. in Continuing and Vocational Education from the University of Wisconsin-Madison. His Ph.D. research was conducted on the impact of instructional feedback upon student's attitudes, test scores, and completion rates in a distance education program.

Before joining AIS, Glenn worked for the Credit Union National Association for 12 years. He is also a member of the American Society for Training and Development.

Students and Their School: The Critical Link

In any discussion of the student service department in a correspondence institution, one concept comes up almost every time: communications. Your ability to communicate well with your students is the single most critical skill you will need to fulfill your responsibilities as an educator.

In this chapter we'll examine the range of good communication options, and raise points which should help you plan a good communications program.

The lifeblood of any good home study school is satisfied students. Effective communication is a critical ingredient in keeping students happy and studying, yet communications in and of themselves will not satisfy students. It is the *lack* of communications that becomes a problem. You cannot over communicate with your students.

Know Your Students and Their Needs

To have satisfied students you must be providing a service which meets their needs. The central vision of your communications effort is that students feel and experience the support of the school for their learning activities.

To meet student needs you must first understand who they are. What is your student profile? Who are they and what are their concerns? How would you describe your average student in terms of age, sex, education, work experience, cultural background, etc.? What are your students' expectations regarding the course? What type of communications do your students expect from the school?

To fully encourage, guide, and motivate people, you must first understand them. Your students cannot see you, so there is an increased dependence upon written and telephone communications.

You have a real mission to your students who have placed themselves in your hands and trust. Many students are starved for affirmation and support. Student needs will be different according to learning styles, but each student still wants to know: "Am I on the right track? Does the school care about me? Am I important?"

There are three different types of communication needs of students who are at different stages in the course:

1. The new student is concerned with orientation—how does the school and the course operate? New students can dropout or be "lost" easily. Questions about the method of study must be resolved. Your communications need to reassure them that they have made the right educational choice.

2. The ongoing student is concerned with his or her performance

in the course. Communications at this stage should encourage them to continue to be successful.

3. Struggling students need help. Students labor for many reasons. You need to assure students of your school's continuing support and desire for them to be successful.

Developing a Communications Strategy and Objectives

An important first step is to plan your communications strategy and develop specific communication elements. Two important principles underlie every communications strategy:

First, everything your school does—or doesn't do—communicates.You can never "not" communicate. Everything you do forms an impression, which supports or hinders the learning of your students. Even the absence of communication is sending a message to your students.

Secondly, develop realistic objectives and goals. Your communications objectives help you specify what it is that you are trying to accomplish. Different types of communications will accomplish different results. The main objective is always to serve students. There are three other important objectives: 1. to maintain contact (A common reason students give for canceling out of a school is that they don't feel that the school cares about them); 2. inform; and 3. motivate.

A caring attitude is determined by the school's image, content, frequency, and form of communication.

What is your school's intended image? The goal of your communications is to present a persuasive appearance that builds credibility in the minds of your students. Conduct a quick "image" audit of your school. Do you have an attractive, up to date logo which is used consistently on all your materials? Are your materials attractive? Are your telephones answered promptly and courteously? Be honest in your evaluation.

Then ask yourself, *what* is it we are communicating and *how often* do we do it? How often do you communicate with different segments of your students? Your active students are communicating regularly—and they expect you to respond.

What formats or forms of communication do you employ? Evaluate everything in light of how it is helping you assist your students.

Look around your school and consider the many potential communication opportunities which you might improve. With imagination and some work you can probably improve these communication devices. Here's only a partial list:

- Course Packaging
- Course Texts
- Request for Help Forms
- Return Envelopes
- Motivation and Encouragement Letters
- Collection Letters
- Course Catalog
- Telephone Reception
- Voice Mail Messages
- Toll Free Watts Line
- Diplomas
- Examination Comments

Finally, the school's management has to make decisions about the service levels the school can afford to make to the students. A perfect school provides the maximum amount of information, motivation and encouragement. A *real* school has limitations of time, money and resources. Most schools experience a tension between what the staff would like to do, and what the school can afford to do. Every planned communication needs to be evaluated according to your objectives and resources.

Proved Methods of Communication

By now, you recognize that a communication system responds both to the needs of the students and the goals and objectives of the school.

When we think of a communications system, we usually think of what the school does to initiate communications (through newsletters, surveys, etc.). Schools also have to have a system in place to respond to student-initiated communications.

School-Initiated Communications

The school newsletter (or magazine) is the best all-around method of communicating with students. Publications of any sort serve as a vehicle for student accomplishments, contests, announcements, and general awareness of the program.

Every school needs a system for identifying those students who need encouragement or remedial work. If your school does not try to encourage students who are struggling, or who have not sent in a lesson within a given time period, then you open yourself to criticism that the school does not care about its students.

Outcomes assessments are also becoming more and more important as a communication tool. Take a close look at yourself in the assessment process to determine, among other things, how effectively you are communicating with students. Assessment can take many forms including a written or telephone survey. Surveys can be formal, or informal depending upon how much information you would like to gather, and the rigorous nature of the information.

The instructional feedback you give to your students is an often overlooked major communications component. "What" is said on the assignments and in the feedback letters going to the students has an important informational and motivational component.

Each feedback letter to the student should give clear, concise and relevant information about the student's performance. The letters should spell out an articulated, compelling reason for further action (encouraging the student to send in the next lesson) and set clear goals and strategies for the student. Finally, each letter should clearly state the support of the instructor for the student's learning effort.

Student-Initiated Communications

When a student calls or writes for help, you are presented with an excellent opportunity to make the correspondence method "come alive." Good student service is marked by good communication—it sets apart the professional home study educator from a bureaucrat.

Letters from students should be answered promptly and courte-

ously. Because of the cost of writing letters, encourage students to call the school. Telephone calls are much easier to handle and the student can often receive quicker service. A Toll-Free Watts line will pay for itself in improved service, and it also communicates an attitude of caring.

Throughout the student's enrollment period, he or she is likely to call the school only once or twice (aside from examinations and assignment submissions). Make the most of these opportunities to keep your student sold on your program.

A student calls because he or she needs something. It's important to understand those needs, and to react appropriately. A single telephone call can make the difference in a student progressing or dropping out of school. It is simply good business to give students warm, immediate, personal attention.

Students call when they have a question, a social need, or an administrative matter they would like to settle. A request for help on an assignment is a frequent topic. These struggling students need a prompt answer to a problem.

Students call to settle administrative matters. They need a transcript, they have a problem with making their payments, a fire has destroyed their home along with their lesson materials. And a certain percentage of calls will be from parents or spouses of a student seeking information on behalf of a student, or asking the school to motivate the student with a phone call or letter.

Students call because they have social needs. "I didn't want to disappoint the school because I know you've been expecting my lesson;" "I've been sick;" "I've been in an accident;" "There's been a death in my family;" "I've lost my job;" "My daughter has run away from home." Your students are real people with sometimes agonizing needs who are seeking your understanding and compassion.

Students want to know that the school cares about them. To enhance your communications, keep these simple points in mind:

- Always answer the phone courteously and professionally
- Get to the point—how can you help the caller?
- Listen carefully to the student's situation and question.

- Realize that students are not problems—they're people presenting you a service opportunity!
- Ensure that you understand fully what the concern is
- Ask for feedback to see if you're on the right track—"Does this sound helpful, Mary?" "Have I stated what you need correctly?"
- Don't hoard knowledge—show you care by giving all the facts
- Respect your listener—they can sense condescension.
- Break down barriers and establish rapport with appropriate "small talk"
- Quell rumors or concerns immediately
- Always make follow-up notes of your communication.

Electronic Communications

This chapter would not be complete without a mention of new communications technology. It seems that every month there is new technology, and new uses of existing technology to make communications with students easier and quicker. Notable among these are the advent of the fax, the computer modem and bulletin board, voice mail and voice response systems. With these systems come the ability to administer tests by telephone, the ability to access account information remotely and a host of other potential services. Test each new technology to see if it has the ability to help your school at a cost you can afford.

Summary

Communicating with students is a responsibility and obligation of each school. Everything you do communicates. The purpose of communication is to benefit your students. Your students are real people with real needs. Everything you say makes a difference in encouraging or discouraging them in their studies.

You will never have a perfect communications system, but you can have one that is well-designed and implemented. Strive to make your school one of those which is known for its excellent communications.

Chapter Seven

Testing and Student Service

by
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The Author

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His expertise has made him a much sought-after speaker and consultant in the developing, marketing and servicing of home study courses. Dennis is also one of the co-authors of NHSC's Home Study Course Development Handbook, *and he has written several articles for other NHSC publications.*

Introduction

Testing and student service are vital elements in any formal educational process, no matter what the mode. But they are especially critical to success in home study—both for the student and the school. This is because two of home study education's worst enemies are delay and demotivation.

Convenience and cost effectiveness are home study strong points: home study can deliver many types of training in many subjects almost anytime or anyplace—and usually for a fraction of the financial or personal cost of residence education. But in a class-

room or similar setting the instructor can ask students questions or observe them working in order to judge their understanding of the subject and their rate of progress. The instructor can give guidance or feedback that is immediate and personal. The response to more formal types of testing—class assignments, quizzes, or examinations—can also be fast and focused.

The situation with student service is similar: If classroom students have questions about the program or need help with administrative matters, they can ask and receive an immediate and personal response.

All of this not only provides information and learning support; it also can forge a bond between the student and the instructor, the school, and the learning process itself. This bond can be a critical factor in student motivation, and one of the biggest challenges in home study is creating it. The failure to do so has been the reason for the failure of some well designed, well presented, and potentially valuable home study programs.

The "lag-time" that is inherent in the traditional method for delivering home study education—mail—tends to create feelings of distance and disconnectedness for students. If this built-in delay and the attendant negative feelings are compounded by the school's procedures (that is, sorting, grading, and responding to student work and requests) or by "canned" comments or inadequate answers to questions, the result can be a loss of motivation that inevitably reflects in students' success with their training, and ultimately in the success of the program itself.

To avoid this, home study educators must pay as much attention to testing and student service as they do to the instructional design of their programs and the preparation and production of their course materials. They must be progressive and resourceful in harnessing the expanding array of communications media. And—most of all—they must ensure that their instructors and everyone connected with the program (in other words, every person in the organization) has an understanding of the need, as well as the skills and resources, to do their part to provide students with effective testing and service.

Know Your Students

The inscription carved over the entrance to a famous Greek

temple read "Know thyself." For educators, an equally important injunction is "Know the student." Simple as it sounds, this is one of the cornerstones of good testing and service (in fact, of good education in general); it needs to begin with the school's first contact with the student, and to continue throughout the entire training relationship.

You can get a lot of useful information—name, address, educational background, and so forth—from a well designed application or enrollment agreement. But you need more to see your student as a "real person." This is why many schools ask new students to complete a questionnaire that asks about special interests, career goals, personal preferences, outside activities, even how they like to be addressed (by a nickname, for example). Such questionnaires should be separate from applications and other administrative or legal forms (that is, not part of the same document). It is usually best to send them with the first shipment of course materials, and to ask that they be returned with the first submitted assignment. The information that comes back should be stored on computer, in a "hard-copy" file, or some other way that is secure but accessible to instructors and key support personnel. There should also be a way to change or add new information.

Of course, with widespread concern about privacy, personal-survey questionnaires must be thoughtfully designed. The questions should be non-discriminatory and non-invasive. Their relevance to educational or vocational activities should be fairly obvious, or else explained on the questionnaire itself. The questionnaire should also include a statement that its sole purpose is to enable the school to provide more personalized service and more effective education, and that the information provided will be strictly confidential.

Some schools even ask for photographs of students. This should be optional, and the responses may be amusing (you might get photos of students wearing party hats or holding family pets), but it reinforces the feeling that you are sincerely interested in knowing more about your student.

At any rate, equipped with the right kind of personal background information (with or without photos), instructors and support workers are in a much better position to give students the kind of individual attention that will keep them from feeling like "just

another number" in an unfeeling and inhuman education machine.

Part of the Course

Testing and student service are part of a home study course, and they need to be presented just as well as the other information or skills the course teaches—and, like the main subject, in the way that is most effective.

Many schools provide students with manuals or booklets that describe how course work is submitted, graded, and reviewed; some include study tips and other helpful administrative information. Unfortunately, students do not always pay attention to this material; even if they read it (and many don't), they forget it by the time they need it. This results in frustration for students when they hit snags, and under-utilized time for instructors or other personnel when they have to field questions that are already answered "in the book."

However, it does not mean that student handbooks are useless. They can help clear up a new student's misgivings and misconceptions, and they can serve as a general guide, or directory, to the program and support services—especially if they include often-used addresses, telephone and fax numbers, the school's operating hours, and so forth. But they cannot do the job alone, and there are alternatives that are worth considering.

For example, a lot of information routinely included in student handbooks can be put in an introductory assignment; this makes it a permanent part of the course—harder to ignore and easier to locate than a separate booklet. As with instructional texts, some information can be given effectively via audio- or video-tape; this makes it more accessible and more convenient to review.

Helpful reminders and pertinent information should be inserted wherever they are appropriate in the course texts themselves—even if they are presented in a handbook or introductory assignment. Putting them in boxed "side-bars" keeps them from interfering with the flow of the text discussion and makes them easier to spot if the student comes back to look for them later. At the end of every course that has a final examination, there should be a review assignment that explains what and how to study for the exam. This assignment needs to tell students what

the exam will be like—for example, written or practical, essay or multiple choice, how many questions, and how long it normally takes to complete. Important to include are how the test will be administered and graded, how results will be delivered, and what happens if the student fails. The review assignment is also a good place to preview subsequent training, if the course is part of a larger program or series, or else to reinforce the importance of continuing education generally.

If enrollment demographics permit, a school can organize and present formal review sessions and administer examinations either in cities centrally located to students, or in conjunction with events, such as conventions or trade shows, that are closely associated with the field of study. Increasingly sophisticated and user-friendly computer programs are making the planning and communications involved in this kind of "extension" program easier and easier.

Review-exam sessions provide valuable learning experiences and emotional support for students—which usually translate into higher pass-rates on exams. They create opportunities for personal contact with instructors—giving the school a human face. And they give the school and its program important exposure to the industry it serves.

How to Test

In simplest terms, testing is the measurement of learning, and as one educational authority put it: "Measurement is the handmaiden of instruction. Without measurement, there cannot be evaluation. Without evaluation, there cannot be feedback. Without feedback, there cannot be good knowledge of results. Without knowledge of results, there cannot be systematic improvement in learning." (Parnell, 1973, p. 268)

Testing and the ensuing evaluation response are among the most important functions of a home study school. While the majority of us understand that testing is the most common means of evaluating and measuring a student's progress and mastery of a subject, in home study testing and especially the subsequent feedback given to students *are the heart* of the learning experience. Analyzing test results from a statistical perspective can also help the school improve the quality of its testing and even its courses.

Today, as our educational goals become more complex, we face more challenges in testing—but we also have more resources. Home study educators deliver a wide range of information and skills—ranging from abstract mathematics and quantum mechanics to computer repair and gem identification. We have students who are unable to read and write effectively, and who cannot perform fundamental arithmetical operations. In the face of increased criticism of the quality of education, and increasing demands for accountability on the part of education, the task of measuring and evaluating educational achievement has become even more important, and more difficult.

How an organization measures a student's development is a matter of philosophy, the nature of subject being taught, and also practicality. It is obvious—but also simplistic—to say that the form of testing should correspond to the subject of the training. Economics and logistics often make it necessary to compromise, or at least creatively improvise: for example, building a $100,000 vessel is not a very realistic test for a course in yacht design, but creating a computer model might accomplish the same objective for a feasible cost.

One of the first steps in testing-design, then, is determining how to best go about measuring what a course is supposed to teach. If the course's educational objectives have been clearly defined, this part of the job will be much easier. And when a course includes both theory, or background information, and practical skills, testing should include an appropriate combination of formats.

People learn best by doing, and whenever possible, testing should be practical, involving work projects that produce concrete results. Passing a practical test validates a student's learning like nothing else: if the test is to wire a light-socket, and the light comes on when you flip the switch, you know you learned your lesson. But practical testing can also be expensive to deliver (in both materials and postage), and it can be difficult to evaluate objectively. The key is to find a way to measure the skill efficiently as well as effectively.

For written tests, there are a number of familiar formats which can help measure student achievement and document a course's usefulness or identify its problems. Each has advantages and drawbacks.

Essay tests are the easiest to develop and administer. They allow students to supply rather than select correct responses. They are the only way to assess a student's ability to compose an answer in effective prose. Better students prefer them because they give an articulate person a chance to show off what they know. On the other hand, however, grading essays is highly subjective: one person's reaction to a particular response may be different from another's—even penmanship can affect how the grader reacts. They are also difficult to process quickly enough for students to get their results in a timely fashion.

True-False tests have many advantages. They are good to use with young children and poor readers. They can be graded quickly and easily by a computer, and are excellent for testing values and beliefs. But they do not provide much of an indication of the depth of a student's knowledge. Cheating, guessing, and misinterpretations of questions are also a problem.

Short-answer testing (often called "fill-in the blank") is a format that combines elements of essay writing and true/false exams. The usual method is to have a student complete a sentence with a word, a phrase, a symbol, or a number. Such tests are easy to administer, and allow for some variance in what constitutes a correct response. But they limit the type of questions that can be asked, and they encourage rote memorization rather than the ability to synthesize concepts.

Multiple choice exams offer the greatest versatility. They provide an excellent way of measuring recall; if they are thoughtfully written, they can also gauge a student's judgment and reasoning ability. They can be scored inexpensively, quickly and objectively, and are very efficient. The degree of difficulty can be controlled, and they can provide the teacher with valuable diagnostic information. At the same time, however, some educators believe multiple choice exams reward less able students, and writing good multiple-choice questions requires as much thought and effort as writing good course texts.

Response and Analysis

Regardless of the format, turn-around time on quizzes and examinations is crucial. Returning corrected exams within a day or two motivates students to go on to the next lesson. It also helps identify people who need extra assistance.

Computerized grading systems cut down on student-teacher response times, and, depending on the sophistication of the programming, verify the quality of the test as well. The few drawbacks created by computerized grading generally stem from the answer sheets. Students sometimes mutilate them, make sloppy marks, enter two answers for one question, or "shift down" a line on the answer sheet. Most of these mistakes are easily resolved by having an instructor look over response cards before inserting them into the computer.

Complex computer grading systems, however, offer a variety of benefits which help both the institution and the student. Initiating these types of programs takes a great deal of planning, but they do much to improve communication and student motivation. With a computer analysis of students' answer sheets, instructors do much more than note incorrect answers—they can provide a personalized letter explaining why the student probably chose the response they did, why the designated response is better, where in the course material the student can review the reasoning behind this distinction, and what they can do to avoid similar mistakes in the future.

The result is a set of comments tailor-fitted to each individual, which helps them progress more rapidly. Detailed responses can be prepared for each distracter in a multiple choice exam: "On question 5, you selected 'A' and I can understand why. Checking the power supply is a logical response to the symptoms. But fuses fail a lot more often than power supply units, which is why you should check that first. You might want to review the troubleshooting sequence on page 7."

It also becomes possible to analyze the effectiveness of individual questions, as well as entire exams. There are any number of software packages which tally percentages of correct answers for a large group of students. Consistent errors on specific questions mean there may be a problem with the course material, the question, or the way the exam is administered. Other programs can handle administrative concerns, such as record keeping, billing, and triggering the shipment of new materials. Congratulatory messages for successful students, and motivational hints for those in need of encouragement are other programming alternatives. It is important, however, that students feel they are not just dealing with a machine. In this modern era of answering machines, computerized telephone systems and computer-generated letters,

we all feel more and more frustration and anger. We would rather deal with people than machines. Good service can account for many business successes in and of itself.

On the other hand, the added convenience, speed, and reliability of computers are tempting. We succumb to them because they increase our productivity. And, slowly but surely, they irritate us less and please us more. Remember placing long-distance calls through the operator? Now, with the help of computer-controlled switches, we can direct dial almost anywhere in the world. It wasn't very long ago that the best someone sending a letter from one coast to the other could hope for was 24 hours. Now we can send a document around the world in microseconds. Indeed, before the advent of computers, did we even use the word microseconds?

It is hard to imagine running a modern business without a computer. They make us incredibly efficient and productive, and they are remarkably cheap. Today, everything done by a top-of-the-line business system that cost hundreds of thousands of dollars in 1970 can be done with a low-end personal computer that is faster and easier to use, and costs less than a thousand dollars.

The Instructor

So let's think of computer-graded exams as a tool to help instructors intervene at various points in a course. High drop-out or low start-up rates, and consistently poor examination scores may not indicate a problem with materials; they may point to a lack of timely, personal attention being provided to our students.

The most important service a home study institution can offer its students is a strong student-teacher relationship. Some sort of substitute for the day-to-day classroom encounter is essential. The primary responsibility for this falls upon the instructors. It is their job to provide encouragement, keep students happy, and help them succeed. And, since they are on the front lines, instructors can provide feedback to senior education managers whenever certain assignments or questions repeatedly indicate problems.

Students do not perform well if they think they are just a number. As every good salesperson knows, we all love the sound of our own names. First names especially help create a sense of familiar-

ity. Certainly, if "Deborah Smith" signs a note as "Debbi," that's a good sign she prefers to be addressed that way.

The instructor can also do much to motivate the home study student—indeed, motivation is perhaps more important than specific, content-oriented information. Comments on answer sheets should always reinforce good performance and offer encouragement. Even successful scores should get response; there is always room for improvement. It is impossible to provide too much positive reinforcement. Remarks reminding a student that good grades are something to be proud of, a word of thanks for exceptional work, and congratulations on a job well done all encourage students to press on with their studies. If the instructor is generating responses on a word processor, a variety of appropriate comments of this sort can be pre-programmed and called up in a single key stroke.

Sarcastic, discouraging, or negative comments are out-of-place. People who receive failing grades need additional motivation, along with detailed critiques and suggestions for improving their results on subsequent exams. Students who need additional help should be encouraged to contact their instructors. And, above all, the instructor's response must be timely. Questions, whether they involve subject matter, procedural matters, or administrative concerns, should be addressed, or at least acknowledged, within twenty-four hours of receipt.

Final Exams

Adult learners often look at tests with a kind of fear not unlike our instinctive fear of snakes. Tests are often seen as exclusionary instruments in which failure will prevent us from doing something we want to do. There is no escaping the fact that examinations can have a major emotional impact on our lives. We can be prevented from anything from driving an automobile to following a particular career unless we can demonstrate a minimum level of proficiency by passing a test.

So it is important to acknowledge that some adult students will experience exam phobia. One of the roles of the distance educator/designer is to prepare tests with this in mind. In other words, many of the examinations used in the home study process should not be used to exclude the student, but rather to help them learn. Again, rapid feedback is very important. Most of us recall waiting

anxiously for the results of an exam. Picture then, those home study students who have overcome their fear of taking an examination, studied hard for it, and spent part of a day taking it with no one to encourage them and coach them. They send the exam in. Now all they can do is wait. And wait. And wait.

Designing sound and well thought-out procedures for processing home study exams is the first step in providing quality distance education service. It is also one of the major expenses in delivering distance education, so it is under constant scrutiny by the bean-counters. Home study student service personnel are often unnecessarily subjected to a morass of administrative procedures and budgetary restrictions that inhibit their ability to respond promptly.

The multi-step process of receiving, grading, recording and returning examinations in a home study school is an easy target for bureaucrats who want to make a name for themselves. What is overlooked is the necessity of continually monitoring the effectiveness and necessity of the various steps. Bureaucrats are constantly introducing new procedures or modifying old ones. All too often these are designed for the convenience of the perpetrator rather than the student. The bureaucratic beast is usually allergic to the convenience weed; regular doses of medicine in the form of reminders of the school's goals and aspirations will work wonders.

Administrators need to understand that one of the goals of home study education is to return exams as quickly as possible. Alter-ng existing procedures should be done with that goal in mind. First-rate administrators will examine every step of the process and weed out or modify anything that hinders returning the graded examination to the student. Our success depends on satisfying our students and student performance can be negatively influenced by dilatory service. Cost saving procedures that delay the student may result in lost revenue. Without daily contact with a inspirational teacher/coach, and without the peer support enjoyed in a traditional educational environment, student enthusiasm is fragile and needs to be constantly regenerated. There is nothing to be gained by subjecting an enthusiastic student to unnecessary and irritating delays.

Even accountants can come to appreciate the importance of timely student service, once they learn that cost cutting which delays

student service often results in diminished student performance. Students who don't submit examinations usually don't pay, either, and accountants do understand cash flow and the bottom line. Helping them understand that efficient and prompt student service translates into more income is the educator's responsibility.

A Continuing Process

Like the training home study educators provide their students, testing and service are part of an on-going developmental process. Volumes have been written about the various theories and means for learning-measurement; more have been written about designing service systems; and the amount of literature on the computer aspects of these areas is simply overwhelming. It is, of course, impossible to condense all of this into a few pages—nor is it necessary for our purposes here. Most important is for home study educators to realize the need to integrate testing and service in the total design of their programs, and to devote the necessary resources—in planning, personnel, time, and capital investment—to make sure that these vital links in the educational chain are as strong as they can be.

Chapter Eight

Grading Student Assignments

by
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The Author

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Carl has written six correspondence courses and continues to actively promote alternative education by serving as the President of the Association of Christian Continuing Education Schools and Seminaries, a group of 61 American and Canadian institutions involved in degree-level training by correspondence and distance education.

The Need for a Grading Standard

In 1912, professors Daniel Starch and Edward Elliot startled the educational world with a survey on grading. They reproduced two identical English examination papers and sent them to 200 professors for grading. One paper received grades that ranged from 50 to 98, and the other from 64 to 99. Repeating the experiment with a geometry paper yielded even worse results. Its grades varied from 28 to 95—the distribution following the normal curve (Feder, p. 139).

In the 1930s, a similar experiment was completed. An identical

paper was sent to the "same" teachers after an interval of several months. The range of grades was almost as wide as that in the prior survey. Not surprisingly, the problem of grading essays, papers, and similar assignments has not improved much in the last 80 years. Consistently, current studies show disagreements in the grading. The best paper in a class may receive a "D" or "F" while the worst may be awarded an "A" or "B."

Yet, simply because grading essays, papers, and projects is erratic and arbitrary does not mean they are not useful nor that they cannot be graded reliably. It is the goal of this chapter to suggest guidelines that will increase consistency and precision in evaluating assignments that cannot be corrected by a scoring template or electronic methods.

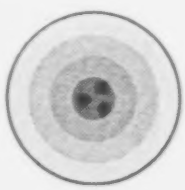
The Basis of the Grading

A well-written statement of the task to be performed is the framework within which the student performs the assignment and the examiner grades it. For this reason, the assignment instructions or the statement of an essay question must be planned carefully. The need for "clear instructions" and four steps for developing effective instructions are outlined below.

To be effective, the test questions must include two elements: reliability and validity. The difference between these two words is often illustrated by an archery target. If the arrows struck on all corners of the target, the shooting would not be reliable. In the same way, if a testing instrument grades students of equal knowledge erratically it is not a reliable testing device. On the other hand if all the arrows are closely clustered but far from the center of the target (or testing instrument) it can be said to be reliable but not valid. To be valid the arrows should strike "closer to the center" of what the instruction intends. We see then that the goal of effective testing is reliability (the grading is consistent) and validity (the grading is "on target" with the learning objectives of the course). Notice how the arrows in the targets below illustrate the distinction between reliability and validity.

Not reliable or Valid

Reliable but not Valid



Reliable and Valid

The Best to Test—the Worst to Grade

Instructional exercises (essays, papers, assignments, projects) that require the student to apply, organize, and evaluate ideas are without a doubt a necessary part of effective learning. In a study of the retention rates of students, it was discovered that when students were given an assignment to "practice" what they had learned, their retention rate was an amazing 75% compared to a mere 5% from listening to lectures. For correspondence schools subjective exercises are an ideal method of compensating for the lack of interaction in a classroom.

On the other hand, subjective evaluation devices tend to be the least carefully prepared and the worst graded of any evaluation device. Many professors spend far more time writing an adequate multiple choice question than they do writing the assignment for a term paper. Yet, they pay for their lack of foresight when they have to grade dozens of papers without a consistent standard.

Often the dilemma of grading papers and projects is so frustrating and time-consuming that the examiner/teacher tends to guess rather than to evaluate. Not surprisingly, one article in an educator's magazine (*Phi Delta Kappan*) was entitled, "How to Grade Term Papers Without Reading Them." It can be assumed that many are graded by the standards of size and appearance rather than by quality of content. Yet such weaknesses can be reduced by a well written assignment.

The Need for Reliability

One way to describe ***reliability*** is the quality of a test (evaluation device) that indicates its ability to consistently give the same results, that is, its ability to consistently measure what it purports to measure.

Judging from the results of the surveys mentioned earlier, this is one of the greatest challenges in grading essays, papers, and projects. At the same time, carefully written student instructions can be a basis not only for telling the student what is expected of him or her but also for guiding the examiner in the grading process. Four essential guidelines for writing clear instructions are as follows:

1. **Define the Task.** In writing the assignment for the student,

the instructor should imagine that he is the student reading the instructions. This will help him to make the instructions unambiguous. Consider this example by Arthur Whimbey of how ***not*** to write an assignment (Pipe, p. 2):

> Cross out the letter after the letter in the word "seldom" which is in the same position in the word as it is in the alphabet.
>
> The answer is "o"; but to find it, the reader had to do some tricky detective work. So it is with many assignments; they leave the student guessing what he or she is supposed to do. A better policy is to state the assignment succinctly, using active and descriptive verbs. These verbs should demonstrate learning at the levels of application, analysis, synthesis, and evaluation. Here are a few examples:

design	plan	evaluate	compare
produce	develop	judge	analyze
categorize	classify	create	modify

No essay question or written assignment should simply repeat facts at the rote knowledge or comprehension levels. Questions at those levels should be tested with an objective question—they are easier to grade.

Poor essay questions that reflect lower levels of learning ask the student to simply recall a list. They frequently begin with "who," "what," "when," or "where." If the assignment asks the student to neatly copy information directly from a specified source it is no more than a lesson in penmanship.

2. **Limit the Content.** It has been estimated that "every forty minutes enough new information is gathered to fill a twenty-six volume encyclopedia. Furthermore, nine-tenths of all the scientists who have ever lived are alive today." (Pipe, p. 2)

With such an abundance of information, schools are challenged to focus precisely on what they expect from the student. One way to do this is to limit the content of the paper or the breadth of the project. For example, an excessive (extended) assignment would be: "Explain the policies of the NHSC." Such an open-ended assignment allows so much variety it jeopardizes an adequate answer key for the grader. A restricted assignment would be:

"Outline the refund policies of the NHSC." In addition, the instructions could guide the student to sources for the study or clarify a particular emphasis the professor is looking for.

3. **Indicate precisely on what factors the student will be graded.** Long before the grading begins the examiner must ask what is expected from the student to qualify for an acceptable grade. These requirements should be included in the instructions. The most obvious instructions include the length of response required, the number of points to be covered, and the point value of the assignment and/or its various aspects. If the student is to be graded on style, spelling, and neatness, these should be included in the assignment. If the student is expected to have a certain number of reasons or approaches, include these in the assignment, also.

In general, it is better to give an exam with multiple short essays rather than one or two large essays. This diminishes sampling error. With multiple essays the grading key can be more tightly structured, the grading will be simplified, and the student can be examined in a wider range of areas.

Similarly, in lieu of requiring that a paper be open ended and organized by the student, the examiner might structure the response into various sub-points to facilitate objectivity in grading. The more structured the assignment is, the more specific the instructions can be to the grader.

4. **State the conditions under which the assignment is to be completed.** Is the student completing the assignment under a time limit? Does the student need to use a certain type of footnote, a certain literary style, or a certain type of paper? Does the student need to use periodicals in addition to books? These conditions should be given in the instructions; they should not come as a surprise to the student when the final grade is given. It follows, then, that the student should not be graded on what he or she was not instructed to do. If the school wants to grade the student on the use of certain paradigms, charts, or graphs, it needs to include this in the instruction for the assignment.

The Need for Validity

Validity is concerned with whether the testing instrument is testing something that should be tested. That is, does it test the stu-

dent in the content required by the objectives? Has prior work adequately prepared the student for the assignment? Is the assignment meaningful?

The type of grading system that is weakest in the area of validity is called the "norm referenced." This determines the student's grade by rank in a norm group (class, etc.) rather than by mastery of the content. This method is popularly called "grading on the curve." It also allows an excellent mark for a student who has not mastered the material but did learn it better than his or her classmates. Such a system is abhorred by most correspondence study educators.

By contrast, "criterion-referenced" grading is based on a student achieving a certain level of competence as outlined in the "criterion" for the course. Another name for this approach to teaching is "mastery learning." It asks a student to "master" a body of knowledge or specific skills rather than to perform better than his colleagues.

Criterion-referenced grading depends heavily on stating the criteria in educational objectives that can be measured. Each objective must have at least three crucial elements: (1) A description of an observable action that will demonstrate what a student has learned; (2) the conditions under which this action will be performed; and (3) the standard of performance that will be accepted as proof that the student has indeed learned.

In such a system, no assignment at the end of the course surprises the student who is told from the beginning what he or she will be expected to accomplish by the end of the course. The assignment of a paper or project simply gives more specificity to an educational objective. Here is an example stating the action, the conditions and the standard:

> **Instructional objective**: (within the course)
>
> When you have finished this course you will be able to ***design*** a semester course curriculum using the ***seven steps*** of curriculum development.
>
> **Assignment**: (In the final evaluation)
>
> You will design a curriculum for a high school course in

U.S. History to be studied three hours a week over a 16 week semester. The assignment should include a description of each of the seven steps in curriculum development from a needs assessment to evaluation. The entire paper should be no less then ten pages and no more than fifteen. You will be graded on following the format manual and for errors in typing, spelling, and grammar. This assignment will be worth 10 percent of your final grade.

The Standard for Grading

Earlier in this chapter we cited some examples of a lack of objectivity in grading papers. The problem, however, is more complex than the variety of grades that can be given by several professors. Even the time of day or the order in which a paper is graded can significantly affect its grade. The *Journal of Experimental Education* recounts:

> The passing or failing of about 40% of students depends not on what they know or don't know, but on who reads their papers.
>
> The passing or failing of 10% of the papers depends on the time of day the papers are read.
>
> The grade a paper gets is heavily influenced by the quality of paper the grader read just prior. If a "C" paper is read after an "A" paper, it will probably drop to a "D," but if it is read after an "F" paper, it will likely rise to a "B." (Feder, p. 146).

It is obvious that even experienced teachers need a concrete standard by which to grade essays, papers, and projects. If not, grading written assignments will degenerate into an intellectual bingo game. Below are four suggestions for increasing reliability in grading.

Define Standards for Literary Devices and Style

It is obvious that spelling, grammar, and organization of thought are important criteria in English Composition courses, but how important are they in the study of forensic law or physical science? A standard for grading such secondary elements must be established.

As a general rule, the student should not be graded on what he or she cannot control or was not taught in the course. If the student has not been taught to outline or quote, then he or she should not be penalized for doing these things incorrectly. This is especially true with essay exams where the student's handwriting is often graded as severely as his or her knowledge of the content. No matter what grade the student receives, his or her penmanship will probably not improve.

Although many schools see "literary style" as a basic goal to be integrated into all of its courses, it should not dominate the grading in a subject for which literary skill is a secondary issue. It is best to fix a limit on how much the grader can deduct for such elements. Since sloppiness and lack of correct style will negatively affect grading regardless of the policy, it may be wise to stress the maximum deduction that can be made. Generally, no more than 10% of the grade should be attributed to these areas if they are not integral to the subject.

Formatting can also affect grading. Each school should develop written policies on how important style and neatness are to the grading process. Since this is an area where great variety in grading can occur, it may be necessary for the school to provide each student with a manual of style. The instructions for all assignments should then refer to the manual and advise the student that a portion of every grade is determined by following it.

Provide a Check List That is Criterion Referenced

Some types of assignments lend themselves to be broken down into parts, sub-points, or descriptions. A "check list" can then be produced that singles out the points to the grader. This is called the "point system" or "analytical method." The advantage of this method is that it provides a standard method of "measuring" the assignment.

The point system is best with an assignment that has consistent elements that repeat themselves with every student's work. In such cases the student should know what is expected of him or her from the objectives within the course and the specific instructions for the assignment. Students cannot be graded on what they were not expected to know or do.

The check list might ask the grader to simply acknowledge the

presence or acceptability of an item, or it may provide a grading scale with point values for each item of the list. Below are three common forms.

1. Acceptable _____ Not Acceptable _____

2. Exceptional 5 Superior 4 Average 3 Poor 2 Failing 1

3. Superior _____ Average _____ Poor _____

In creating a check list, the primary source is the written question. Does it ask the student to "contrast?" Then the check list must ask for a "contrast." Does it ask for a defense? Then the list must specify a defense. If it asks for a certain number of some issue that number must be on the check list.

Read these instructions for an assignment in "Sociology" and then compare them with the list that follows:

> You will describe the culture in which you live in four areas; historically, culturally, intellectually, and socially. Material on each of the four areas should be at least one page in length and should include at least four distinct characteristics. Your paper should be 5 to 8 pages long, typed, and formatted according to the "Manual of Style." The total point value of this assignment is 20.

*Four Historical Characteristics:	up to 4 points ____
*Four Cultural Characteristics:	up to 4 points ____
*Four Intellectual Characteristics:	up to 4 points ____
*Four Social Characteristics:	up to 4 points ____
*Length of paper:	up to 2 points ____
*Formatting, Grammar, Typing:	up to 2 points ____

Provide an Example and Rating Scale

Not all assignments can be "measured" with a specific checklist. On larger papers and projects, where the subject is not restricted or structured, an overall "evaluation" of the assignment must be made. This is called the "global scoring" method since it asks the examiner to give a general opinion of the entire product; it does

not help him analyze and measure individual parts. Although some of this "holistic" evaluation must be done, even this type of grading should be based on a standard.

Samples of answers, assignments, or projects should be provided for the grader to compare with the assignments he is grading. The answer key should include the major aspects the pupil should include in his response. Sometimes these can be measured with "acceptable" or "not acceptable." At other times categories such as superior, average, or weak need to be recommended. Yet, by stating the areas of evaluation, the school is providing a consistent standard for measuring even the most diverse assignments. Here are some example questions for grading a term paper:

(ALLOW 2 POINTS FOR EACH QUESTION)

Non mechanical

1. Is there a clear theme statement?
2. Is the theme developed in a logical manner?
3. Is each main point supported with at least two examples or arguments?
4. Does the student draw an overall conclusion that addresses the theme statement?
5. Does the paper evidence adequate research?
6. Is there evidence that the student has mastered the material?

Mechanical

1. Is the paper of adequate length? (check for artificial lengthening with blank sheets, padding, redundancies, etc.)
2. Is the documentation valid, adequate, and sufficient?
3. Was an outline continuously followed?
4. Did the paper follow official format style?

(Behind each question allow space for the instructor to mark "acceptable or not acceptable" or other grade categories.)

Advise Instructors on How to Improve Objectivity

It should not be assumed that experience as a professor always equals skill as a grader. Some teachers may have 20 years of experience and use it all in grading while others have 1 year of experience repeated 20 times. The school must guarantee that all grading is reliable and valid, no matter which professors are doing the grading.

Four problems in grading capabilities appear consistently: (1) the halo effect; (2) the generosity error; 3) the penalty error; and (4) the influence of extraneous factors.

The "halo effect" is the tendency to grade too high because the student usually does well, or too low because he or she customarily does poorly. This situation can be avoided by withholding the name or grade of the student from the grader until time to report to the student. At the end of the paper it is helpful to comment to the student, addressing him or her by name, but only ***after*** the paper is graded.

It should be added that correspondence schools often have such a variety and number of students that the professor scarcely knows them by name. In such cases it is best not only to know the student's name but to use it frequently in the marginal comments.

The errors of being overly benevolent or severe should be resolved with clear answer keys—especially those that utilize a point system. Occasionally, however, the tendency of the teacher to grade in extremes might have to be pointed out to him or her. It can be helpful to formulate consistent policies of grading with the entire academic staff.

Earlier in this chapter the danger of being overly influenced by extraneous factors such as grammar and handwriting was discussed. A definite limit on what can be subtracted for errors in these areas is imperative. A policy for dealing with questions such as adding points for additional information or subtracting points for padding should be formulated.

Since the time of day and attitude of the examiner can affect the

grade by up to one point, it is best for an examiner to do groups of exams in one setting and perhaps grade one aspect of the assignments at a time rather than paper by paper. Under no circumstances should the examiner change the standard of grading from paper to paper.

Reporting the Grading

Reporting the grade to the student should not be considered a simple act that gives closure to the course. Instead, it should be seen as an opportunity for both the student and the school to receive feedback.

Feedback is a term borrowed from the field of electronics. It refers to a process in which data is "fed back" into a system in order to modify and correct its behavior. A classic example is the thermostat that senses the change in heat and gives "feed back" to the heater to engage or disengage (Barlow, p. 460).

In assignments and essays the instructor has an opportunity to give "feedback" to the student at a much higher level than he would through correcting an objective exam. The instructor can write comments in the margins of papers or a letter can accompany the report on a project. Below are several suggestions for taking full advantage of these comments.

Correction Should be Given Objectively

One international school narrowly missed losing the market of an entire nation because the students were accused of being habitual cheaters in the margin notes of the papers. Little did the school realize how seriously the students read the comments in the margins of their papers.

Since the correspondence student studies alone, he does not have the benefit of hearing the instructor's voice inflection. As a result, casual "tongue in cheek" comments on paper can be interpreted as being much harsher than they were meant to be. Any negative comments should be given sparingly and should always be confined to what the student has done, never to his character, study skills, etc.

This does not mean that the student should not be informed when he is wrong. It means that he must be informed graciously. It is

wise to avoid using direct judgmental statements followed by:

- You did not study much for this exam did you.
- You do not organize your thoughts very well.
- Your writing is sloppy.

Such statements arrest the student's attention with the powerful second person address followed by a statement of judgment—often judgment of an entire area of life based on the one example in the paper—but this can be detrimental rather than helpful.

A better approach to correction is to start the statements with "I" followed with a personal reaction to that specific problem—not a generalization. Notice how rewriting the above statements makes the correction far less offensive.

- I do not sense that you did your best work this time.
- I could not follow your organization very well.
- I struggled with your penmanship. Please write more legibly in future assignments.

In general it can be said that if criticism needs to be made, it should be done in the most objective way possible. Do not attack the student; evaluate his work.

Praise Should be Given Contingently

Although a negative statement should not begin with "you," this can be most effective when used at the beginning of a statement of praise. It captures the student's interest and personalizes the communication.

- You followed the directions perfectly.
- Your organization was simple and clear.
- Your efforts to type this paper made it easy to read.

Praise, however, should *not* be given gratuitously. It should always be contingent on an admirable effort from the student. Given without cause, it becomes artificial at best and deceptive at worst. Imagine the student reading remarks of lavish praise and then noting with shock a poor mark when he or she had been led to believe the work was superior. The student may also interpret

"easy praise" as the acceptance of a low academic standard.

Praise Should be Labeled

Papers and essays are often full of bland, pointless messages like: "good," "excellent work," and "great job." These comments will make the student feel good but will not necessarily motivate him or her to improve. Praise that elicits improvement is "labeled praise;" it tells the student precisely what the professor appreciated. For example, "your discussion of ____ was well researched," or "thank you for quoting from current periodical sources."

In one study of pre-schoolers, the goal was to motivate the children to use diversity in water painting such as blending colors, using a variety of shapes, and layering. The students were divided into three groups. The first group received no praise, the second received unlabeled praise, and the third received "labeled praise." As one would expect, the group that received no praise diminished in its level of diversity; the group that received unlabeled praise did not improve; and the group that received labeled praise made dramatic improvements in using diversity in painting.

This principle is true of all students. An effective instructor reinforces a student's performance by describing ***exactly what*** was appreciated about it.

Give Feedback as Quickly as Possible

The student should receive the instructor's evaluation and comments as close to the time the paper was submitted as possible. This helps reinforce ideas while they are still fresh, gives a sense of closeness with the school, and indicates professionalism in the eyes of the student.

This feedback should not only be immediate, it should be as thorough as possible. If a student was discounted on a grade, he or she deserves to know why. The standard complaint of many students is: "That material was never treated in the course." Thus adequate feedback should include a comment about where the student can look in the course material for the answers that were missed.

From an enrollment standpoint, many correspondence students

wait for their grades on one course before starting on a new course. Immediate feedback can serve to motivate the student to enroll in subsequent courses while the joy of learning is still fresh in his or her mind.

Feedback Should be Personal

Computer generated read-outs can identify errors for objective tests, but when a student has spent dozens of hours on a special assignment, he or she expects to receive a more personalized response.

Certainly, it is impractical to require an examiner to type a unique letter for every graded assignment. The examiner should, however, make some comments on the assignment itself and should, at least, have a model "computer generated" letter that can be adapted to provide a "semi-personal" response to each student.

Some elements of the generic letter will be consistent; perhaps an overview of the examiner's grading system and a list of categories used for grading with accompanying grades from the student. However, along with these items even a single line that makes the communication unique to the student will personalize the letter. The examiner may take a cue from the student's information sheet for personal information that can be used as a "communication bridge" to the student. For example, the student's name is an obvious item that should be used regularly. The major or the occupation of the student might also be mentioned in order to motivate the student. *Under no circumstances should a student receive the final grade for a major project without some comment from an evaluator.*

Should the student be puzzled by the grading or should a question be generated by the study, it is imperative that the examiner respond to these. If not, the student will sense that he or she is a number, not a real student. Remember: the student studies alone and a letter or phone call may be the only means of asking the professor a question.

With some planning "example letters" can be made to cover most contingencies. These, however, should never be photocopied with the name of the student filled in a blank. Even worse is a photocopied answer addressed to "dear student." The letters should always be freshly typed with the student name along with a per-

sonalized opening or closing comment.

Learning from the Grades

Every exam and assignment grades not only the student but also the school and the instructor responsible for it. The school needs to have a system of evaluating grade results and student responses as a means to improve grading and to find flaws in the testing instruments.

Feedback Should go Both Ways

Students appreciate an opportunity to "grade" the school. Since the student is a "class of one," he will only be able to state his opinions if the school provides a form to be filled out by the student of the course, or perhaps the student can be encouraged to call an 800 number for comments, questions, and feedback.

Such evaluation forms become a source of direct self-evaluation for the school. At a minimum they will help discover faults in the testing instruments and grading system. At best they will help develop better written test instruments and more equitable grading methods. In these evaluation surveys the student could be questioned about:

- The clarity of the assignment
- The objectivity of the grading
- The encouragement provided in the course to complete the assignment.

The Goals Should be Reliability and Validity.

Educators evaluate any test instrument by its reliability and its validity. The first refers to how well (consistently) it tests whatever it tests; the second describes to what extent it tests what should be tested.

To test reliability it is good to periodically evaluate the results of students with similar grades in other aspects of grading. Is there great divergency in grades between similar students or between the grades given by different examiners? If so, the instructions (questions) must be rewritten or the answer keys modified.

Occasionally it would be interesting to ask several examiners to read the same paper, to compare the grades. As a follow-up the examiners should discuss any major discrepancies and restate their policies for grading.

Validity can be measured by the success of the student. If the students consistently complain that they are tested on what they were not taught or if the majority do poorly on the assignments, the instruction has failed—not the students.

If the students cannot achieve the objectives set for the course, the objective need to be rewritten and the standards lowered. If all of the students are scoring high, the objectives and testing need to be upgraded.

Conclusion

Educators in England were disillusioned by the subjective elements in grading essays and papers; yet they agreed that this type of test item was necessary to grade higher levels of learning. As a solution, they introduced a system where by five professors graded the General Certificate of Education (GCE) examinations. The system was effective but costly so they then used two examiners instead of five, and eventually used only one.

This example reflects the dilemma that correspondence schools face. Evaluation of learning on the lower levels can best be accomplished with objective items, and well written multiple-choice questions can test higher levels of learning. Realistically, however, some aspects of evaluation cannot be accomplished without precisely written subjective elements. At the same time, these subjective items are the most time-consuming and illusive to grade reliably.

This "illusive" aspect of grading subjective assignments dictates that they not be the "dominant" form of student evaluation. A balance between quality objective testing and subjective evaluation can assure that the weight of the evaluation does not depend on the whim of the grader. It should not be assumed, on the other hand, that the grading of subjective work must be left to chance. Much of the illusive "guess work" can be eliminated by writing clear instructions, providing grading keys, and forming precise grading policies. Beyond this, feedback from the grading effort can be as beneficial for the institution as for the student.

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Chapter Nine

Motivating Students to Complete Their Programs

by
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The Author

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She believes that "Education Can Be For Everyone" and bringing the classroom to the home is a very significant method of training and educating the population. Providing the motivation that helps students complete their programs and achieve their goals is a gratifying experience for anyone in the field of distance education.

Introduction

- Are your non-start rates too high?
- Are your lesson completion rates and graduation rates lower than you want them to be?
- Are your students committed to achieving their goals?
- Are you committed to helping them achieve these goals?
- Do you use fully your time and resources to improve student satisfaction?

If you can answer yes to any of these questions, then you will want to read further to discover how you can develop or improve the motivational efforts at your institution.

What About Motivation?

A 1992 NHSC Home Study Survey reported that the average non-start rates in NHSC accredited institutions ranged from 8-12%, and the average course graduation rate is around 45%. Not only do these statistics cause those in charge of education and product design to stand up and take notice, but they also represent a significant financial impact as well. Why are so many students not starting, when they initially showed a strong enough interest to enroll; and, equally as important, what happens to student persistence throughout the program? A well-designed motivational program that fits the needs of your students may provide some answers to these questions, and could improve these statistics.

There is a time, a place, and a way to motivate. This may differ with each program, each school, and even with each individual learner. However, while it may differ according to student and school needs and it may change as the needs of society become more diverse, the basic need for motivation will not disappear. Rather, home study educators will be continually challenged with the task of deciding how to best apply motivational learning theory to their educational structure and how to adjust it as society's needs diversify.

It is also important to remember that motivation shouldn't be created solely for non-starts or potential dropouts, nor should it end early in the program; rather, it should begin *prior* to enrollment, continue throughout the course motivating students through to successful completion, and encourage continued educational pursuits at the conclusion of the course.

You should begin, therefore, to look closely at the development of a motivational program that meets the needs of your adult learner or improve your existing program if you are serious about the success and persistence of your students and your school's commitment to help them reach their goals.

Motivational Factors

Motivation by definition is something that generates a positive

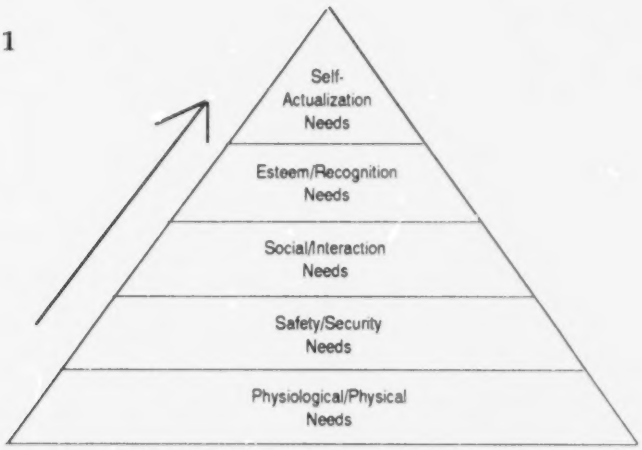
forward motion. It wears many faces. In home study it can and should be twice as powerful as it is in traditional classroom instruction. In the results of a study on "Student Perspectives on the Effectiveness of Correspondence Instruction" by St. Pierre and Olsen, published in the *American Journal of Distance Education,* the findings report that—

> *Motivation was found to be the most important of the feedback variables.*

With this in mind, you need to focus on several key factors in the motivational process.

Most educators are familiar with the late Dr. Abraham Maslow and his hierarchy of needs. Dr. Maslow was president of the American Psychological Association, and his theory is illustrated below:

Figure 1



Safety and security needs would encompass health, security, and general welfare. Esteem and self-actualization needs might be self-image, dignity, and respect. Dr. Maslow maintained that each plateau of needs must be satisfied before you can motivate an individual at the next higher level. For example, it would be difficult to achieve success in motivating to the self-fulfillment needs of a student, when the individual has not satisfied their basic physical requirements. Motivation theory, however, can be effective if it aims at meeting the needs of one of these levels, and if it maintains that the previous level of needs has been met.

The next obvious question would be—How do I motivate at these levels? Dr. Norman Feingold, former member of the NHSC

Accrediting Commission, offered the following as the "four great motivating factors of mankind": Money! Self-Preservation! Romance! and Recognition! By placing these factors in a pyramid similar to the hierarchy of needs, you can see how these motivators can work at each level.

Figure 2

Certainly, these factors drive most of the motivational efforts in a home study environment. For example, at the physical needs level, convincing students that the course will provide a better job and more money should be effective. When you reach the higher levels, you will need to convince students that their course completion will provide recognition and praise, and thus increase their self-esteem. The key to successful motivation is to recognize the needs of an individual at their present plateau and combine those with motivating factors to create a plan to encourage students to set and reach their academic, enrichment, and employment goals through your home study programs.

Once you have a clear understanding of the factors that enter into the motivational process, the rest of your focus should be on these three important questions—

WHY MOTIVATE?
WHEN TO MOTIVATE?
HOW TO MOTIVATE?

Why Motivate?

Taking a close look at the reasons why you do something often helps in understanding how to do it. The questions presented at the beginning of this chapter provide the basis for the following three reasons why we motivate students. They are centered around improving, non-start and completion rates, and helping students achieve their goals.

1. To Encourage Starting

Students who begin a home study course may be enrolling for a number of reasons, some of which may include:

- Scheduling difficulties with a resident school.
- Family responsibilities require them to remain at home.
- They have full time employment.
- Classroom situations are intimidating.

The students who enroll in home study programs for any of the above reasons may need a special motivating effort from the school to begin their course. Sometimes that first effort is the most difficult step in the study process. Many of these students have been out of school for a long time and it becomes difficult to begin, even though the impetus for a career change or advancement may be strong. Once the students have the materials in their possession they may be initially overwhelmed.

The school should present early materials in such a fashion so as not to intimidate and to illustrate the advantages of beginning and continuing the course. This can be accomplished by initial letters, handbooks, tapes, or in content presentation in the first study materials. Design of your first work package to include clear instructions on how to begin can be of utmost importance. These ideas will be discussed in greater detail further on.

Caution must be exercised, however, in approaching early motivation efforts in a very encouraging and sometimes even reserved manner, as adult students who have been promised the ability to "study at their own pace" may feel that attempts to get them started are intrusive. Students need to be reassured that the efforts are pure and supportive of their educational goals.

2. To Encourage Continuation and Completion

The time home study students devote to their programs is always in competition with many other factors in their lives. Some of these competing factors may be family commitments, work related responsibilities, life changes, or social activities. Even though the student has begun his course, when other factors enter in, his ability to continue is hampered. If this is coupled with things like financial difficulties and increasing complexity of course materials, the student may decide to dropout.

For this reason, it is important to continue the motivation effort throughout the student's program. There are two approaches to this continued motivation:

a. On a proactive level. Here such areas as instructional design and handbooks could have an impact.

b. When the potential for dropout becomes evident. Letters and phone calls may be effective at this time.

Various methods to provide motivation for each of these approaches are discussed under "When and How to Motivate."

3. To Take the Place of Traditional Instructional Support

The lack of classroom guidance and support in home study requires extra motivational efforts to provide the structure and feedback required by many students. It is necessary to provide instructional motivation via correspondence, telephone, or telecommunications. The use of supportive written or oral comments can be one of the strongest motivators a school can offer. This form can be in response to student inquiries or it can be outbound for students who experience a lapse in activity.

The reasons to motivate are clear. The more challenging aspects include *when* and *how* to motivate.

When and How to Motivate?

1. Prior to Enrollment

This is where the actual motivation effort begins. It is here that you illustrate to the student, based on their plateau of need, the

way in which home study can meet his/her physical requirements, perhaps through employment opportunities or through job advancement, and their social and self-fulfillment desires.

If we cannot motivate an individual to enroll and begin an academic program, we have no need for further motivational efforts. Although this actually falls under the category of marketing, many of the reasons you use to encourage students to enroll should be similar to those you use to encourage them to continue. For example, if a student enrolls because he is seeking advancement or a career change, then that may continue to be the driving force you need to address throughout his/her program. You can continue to move the student along in the same positive direction, and this is where the real challenge begins.

2. Upon Enrollment

As mentioned previously, this is a vital time for many students. They need to know where and how to begin, how to develop a comfortable, confident rapport with the school, and they need to know that there will be support when needed. Some methods used to create this feeling and encourage commencement in their programs follow:

- WELCOME CALL

  A call to students 10 to 12 days after they enroll, just to acknowledge their enrollment and welcome them to the school, can create a feeling of security and assure the student he has made the right decision.

- ID CARDS AND MEMBERSHIP CERTIFICATES

  A symbolic representation of belonging to a student body can be a powerful motivator for new enrollees. The ID cards can also be used to provide valuable reference information to the student. These membership devices can be sent to the student in a special mailing or included with first work materials.

- LETTERS

  Many home study schools send a special mailing to students upon enrollment. These letters or materials may con-

gratulate the student on his decision to pursue his educational needs and may simply welcome him/her to your school. They can provide valuable information on accreditation benefits as well. An example of one NHSC school's letter is illustrated in Figure 3.

Figure 3

The Catholic Home Study Institute

Accredited Catholic Adult Education by Correspondence

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The Pennsylvania College Association

October 11, 1990

Dear Sister Mary Agnes,

Welcome to the Catholic Home Study Institute! Your course materials are being promptly mailed to you. In the meantime, I wanted you to know how pleased we are to welcome you to the CHSI FAMILY.

You will experience first-hand a unique and challenging method of education. Home Study is the preferred type of learning for adults who are highly motivated, self-disciplined and enthusiastic about learning.

You may be wondering what it will be like not to meet your course instructor in person. Despite the "distance," we try to meet the needs of each of our students. In fact, each student becomes a unique person to us as soon as we complete your registration. You will be in a "class of one."

Although you have nine full months to complete your course, our goal is to have you complete your course in six months or less. We recommend that as a guide, you try to complete one lesson every two weeks--allowing for the busy times in your life.

If for some reason you need an extension of your deadline, please let us know. We will be happy to offer one three-month extension FREE and additional extensions for a small fee. Remember--if your deadline expires without contacting us, you must re-enroll and pay full tuition in order to complete your course.

If you should encounter any difficulty with your course, remember that we are here to assist you. Office hours are Monday through Friday from 9 AM to 5 PM (EST). Just identify yourself as a student and someone will be glad to help.

I am confident that with your new enrollment, you will find yourself beginning a journey that will lead you to an intimate encounter with the Person of Jesus Christ who is, "the Way, the Truth and the Life."

Sincerely in Our Lord,

Marianne Evans Mount
Executive Director

3. In First Work Materials

An NHSC *Washington Memo* once listed an interesting fact. "It takes 15 seconds to make a first impression, and the rest of your life to undo it if it was a negative one." The first impression you make on your students is of vital importance. This impression is accomplished in many ways, one of which is the design of your starter package. Many schools use attractive "Achievement Kits" that are designed using a colorful shipping box. This first package should be engaging and motivating, as you cannot capture that initial reaction to your school in subsequent shipments. The impact is up front! The time you spend designing your first materials is well worth the effort.

- INSTRUCTIONAL DESIGN

  Also of extreme importance is the design of your instructional materials. In an *Eric Report* article, "Distance Education, The Design of Study Material," D. Meacham and D. Evans offer the following on arousal and motivation in design:

  > *If effective learning is to take place, it is important to arouse the student's interest in the material and sustain this interest throughout the subject. A continued desire to learn must be fostered through the intrinsic interest of the materials, an emphasis on the utility of the material to the student, a personalized approach by the lecturer, attractive packaging, and clear layout.*

  Careful attention to the design and presentation of course materials is of utmost importance in your motivation program.

  Carefully stated objectives in each text provide a clear path on which to proceed with each study unit. The reading level of your material should match the audience you are addressing. Knowing your audience and designing materials to meet their needs can be the key to your success and your students' success as well. The use of videos, audiocassettes, supplementary material, hands-on experience, self-tests, and involvement devices can all add merit to the

program and contribute a great deal to encouraging course completion. Also, presenting material in a building block fashion allows students to build their knowledge one step at a time.

Entire books have been written on course design, layout, and structure. If the course materials don't meet the needs of your audience and are not clearly presented in a motivating fashion, your other efforts to encourage course completion will be in vain.

Additional first work motivators could include:

- HANDBOOKS

  A handbook of information about the school and how to proceed through the course of studies can be a valuable reference source for students. Included here should be information about contacting the school, when to expect materials, exam submission guidelines, and should answer many of the anticipated questions most frequently asked by students. Photos of faculty and support staff can also serve to bridge the gap between classroom instruction and home study by providing the student with contacts and setting a friendly tone. A progress chart provided at this time can be motivational as an involvement device and as a measure of success. It is important to keep this reference guide simple and short so as not to slow the student down from starting his/her course.

- PERSONALIZED LETTERS

  Included in the first shipment can be a letter of introduction from the Education Director or from the Course Instructor. They should provide the assurance that there is instructional support available and should encourage students to begin their work as soon as possible. Providing information on the instructor's background can add credibility to the course instruction as well. Refer to Figure 4 for a sample of an introductory letter.

Figure 4

ICS

MEET YOUR CHIEF INSTRUCTOR
FLORAL DESIGN COURSE

Dear Student,

Nothing succeeds like success, and this course has been specially designed for your success.

You'll learn the fundamentals of flowers and floral designing, as well as how to apply this knowledge professionally.

The variety of topics in the course serves as a good foundation for building and developing your talents. This knowledge will continue to be valuable to you as you accomplish your objectives throughout you. career, because success in the world of florists requires more than just talent.

It'll be your job throughout the course to direct any questions or uncertainties toward the faculty and staff. We're here to help you get the most out of your course.

Be sure to take time to review your Student Handbook before you begin your studies. This handbook contains important information about your school and the answers to many of your questions. It gives you guidance on how to begin your course, get questions answered, and progress successfully to graduation.

I'm anxious for you to get started with your course. I know you'll enjoy learning about floral designing as much as I enjoy teaching it. Remember, we welcome your letters and telephone calls. I look forward to hearing from you.

Good luck in your course!

Kathy Ruane

Kathy Ruane
Chief Instructor

KATHY RUANE
Chief Instructor
Kathy Ruane is a graduate of Harcum Junior College with an Associate in Science degree. She has attended the Pennsylvania State University and is currently working toward a biology degree at Wilkes University. Kathy's varied background and experience will prove invaluable to you as you progress with your course in floral design.

- AUDIOCASSETTES

  Introductory audiocassettes have been used successfully by many schools in providing an introduction to the instructor or a preface to what the student will study.

- FIXED DEADLINES

  Some students are more disciplined than others. Many can work at their own pace and set goals and deadlines for themselves.

Students should be encouraged to set realistic goals at the beginning of the program and follow through with them. For those who need a little assistance with this process, a predetermined schedule with fixed completion deadlines may provide the extra impetus needed. The sample in Figure 5 allows the student to set exam completion goals based on suggested completion times. It also provides a record of all lesson grades.

Figure 5

ICS Since 1890

Date

Student #

SCHEDULE FOR SUCCESS					
	EXAMINATION	TIME IT SHOULD TAKE TO COMPLETE	EXAM COMPLETION GOAL	ACTUAL COMPLETION DATE	GRADE
1	007003	11 Days			
2	007004	10 Days			
3	007005	11 Days			
4	007813	12 Days			
5	007814	10 Days			
6	007815	11 Days			
7	007809	09 Days			
8	007810	08 Days			
9	007811	10 Days			
10	007812	09 Days			
11	9402	08 Days			
12	9403	10 Days			
13	9404	10 Days			
14	9409	09 Days			
15	2430A	10 Days			
16	2430B	11 Days			
17	2430C	12 Days			
18	2430D	10 Days			
19	2430E	11 Days			
20	2425A	11 Days			
21	2425B	09 Days			
22	2425C	10 Days			
23	2425D	10 Days			
24	2750A	08 Days			

Motivators in subsequent shipments could include:

- VIDEOS

  The use of instructional or supplemental videos can provide the visual learning experience that many students need. This provides a welcome break from the print based form of instruction and can be an excellent tool in illustrating hands-on experiments and activities.

- TECHNOLOGY

  Many of the forms of motivation we have used in the past and still use will be enhanced by future technology. The use of bulletin board services, electronic mail, and computer based training are just a few of the new methods used to present motivational techniques. The introduction of desktop publishing has allowed for much improved design capabilities and continues to offer new opportunities. Computers are everywhere and their impact will be heavily felt in education. To ignore the possibilities that continue to grow would be a waste of exciting new approaches to education. Technology will play an ever increasing role in how we make study materials and motivational applications more exciting and more effective in the future.

- NEWSLETTERS/FLYERS/LETTERS

  Newsletters providing testimonials, success stories which feature your students, recent developments in the field, or interesting asides which provide a break from the study materials and efforts to encourage continuation of the home study program. Information on job opportunities or statistics can also be inspirational. A sample newsletter is shown in Figure 6. Also stimulating are flyers that "hype" the course content by showing students what to expect next. Letters included in the study units with encouraging thoughts or information on future material can be used as well. The example in Figure 7 is a sample of a letter that appears on the back cover of a study unit provided by one NHSC school.

Figure 6

The Drawing Board

The Student Newsletter of Art Instruction Schools

The Drawing Board — Fall 1992

From the Editor

Welcome to the first issue of *The Drawing Board*.

The purpose of our newsletter, is to inform, educate and motivate. *The Drawing Board* will be published in conjunction with the *Illustrator* Magazine.

Please note that the next issue of the *Illustrator* Magazine will be published in January 1993.

Do you have news? Please drop us a line. We'll be glad to feature as many of our students as we can.

Dr. Jardine Retires

AIS's Director of Education, Dr. Don Jardine, recently retired from Art Instruction Schools after more than 30 years of service to students.

"Don's contributions to the School and the field of art education have been immense," testifies Tom Stuart, President of Art Instruction Schools. "His contributions will be sorely missed."

Don will continue on as editor of the Illustrator Magazine, and will serve in an advisory capacity to the school.

Dr. Glenn Hovle, formerly Associate Director of Education, has been promoted to the position of Director of Education.

Dr. Don Jardine

Art Instruction Schools

AIS Student Wins Award

Robin Franks of Del City, Ok. shows off her award and prize winning art.

Art Instruction Schools student **Robin Franks** recently won top honors in the Young American Creative Patriotic Art Contest, sponsored by the Ladies Auxiliary of the Veterans of Foreign Wars in the state of Oklahoma.

And, as State Champion, Franks sent her artwork on to the national competition in Kansas City, Mo.

Robin Frank's award winning work is a prizmacolor — color pencil — drawing of a bald eagle with the American flag reflecting in its eye.

"I've always liked eyes. I think you can tell a lot about a person through their eyes," Franks says, adding that if that's true for people it must also be true for national symbols like the bald eagle.

She's not presently planning on embarking on a career as a professional artist. Instead, Robin plans to study architecture and to someday become an architect. But if she did intend to become a professional artist, she might have a legitimate chance of making it big. That is, if her experience with Art Instruction Schools is any indication.

For winning the Oklahoma state contest, Franks will receive a check for $200.

Sign Painting for Profit *by Paul Haley*

Editor's Note: When AIS student Paul Haley sent us some photos of his sign work, we immediately sensed that this might be something that many of our students would like to hear about. We asked him to give us some tips on how he started his business.

I went into painting signs because I saw it as one method of selling art in a small town. Seaforth, Ont., where I live, has a population of about 2,300 people. In a town this size art-related jobs are somewhat limited. However, signs are everywhere.

A relative got me interested when he asked me to make a sign for his business because he knew I was into art. I enjoyed the project and eventually set up a small sign shop.

Continued on Page 3

1

- ACHIEVEMENT LISTINGS OR HONOR ROLLS

  These give students something to strive for and are rewarding in nature for those listed. Many schools have experienced positive results with this form of acknowledgement, especially if a student is at the recognition level of needs.

Figure 7

NRI Schools

VISION, REASON, AND COURAGE

You have made a personal commitment to your future. It takes special qualities to put aside the distractions of everyday life and concentrate on your studies, on your future.

Vision is foresight; the ability to percieve what is ahead; the future.

Reason is rational motivation; the power of comprehending, inferring, or thinking. It is intelligence.

Courage is the strength to venture, persevere, and withstand danger, fear, or difficulty.

You have seen your vision of the future. You are using your reason to move toward that vision. You have shown the courage to obtain that visionary goal. Now, you must strive to keep these qualities alive; they will keep your future alive.

As Robert F. Kennedy said, "The future does not belong to those who are content with today . . . . Rather it will belong to those who can blend vision, reason, and courage in a personal commitment."

Remember your personal commitment. Don't allow daily distractions to convince you that your studying can wait until tomorrow. Tomorrow is your future. Each day you remake that personal commitment, you move one step closer to realizing your vision.

William Coleman

William Coleman
Executive Director of Education

4. When there is a Lapse in or Lack of Study Activity

Certainly when there is a lapse in activity the need to motivate is obvious and important. Reasons for a change in study patterns could include:

- Financial problems
- Family related difficulties
- Complexity of materials

- Change in life circumstances

Although the majority of these circumstances fall out of the realm of the home study school's control, providing the right encouragement and support could improve student persistence. Many schools have a series of motivation letters that are generated at intervals once the student's activity indicates dropout potential. The motivational effort may need to be stronger here and the wording on correspondence should be carefully weighed to elicit the desired response.

A phone call to students by the instructor or a counselor can be enough to encourage the students to continue. Valuable information can be gained from speaking to the students directly regarding their reasons for delay in submitting work. This input can be useful in designing future motivational efforts.

5. Upon Completion of Exam

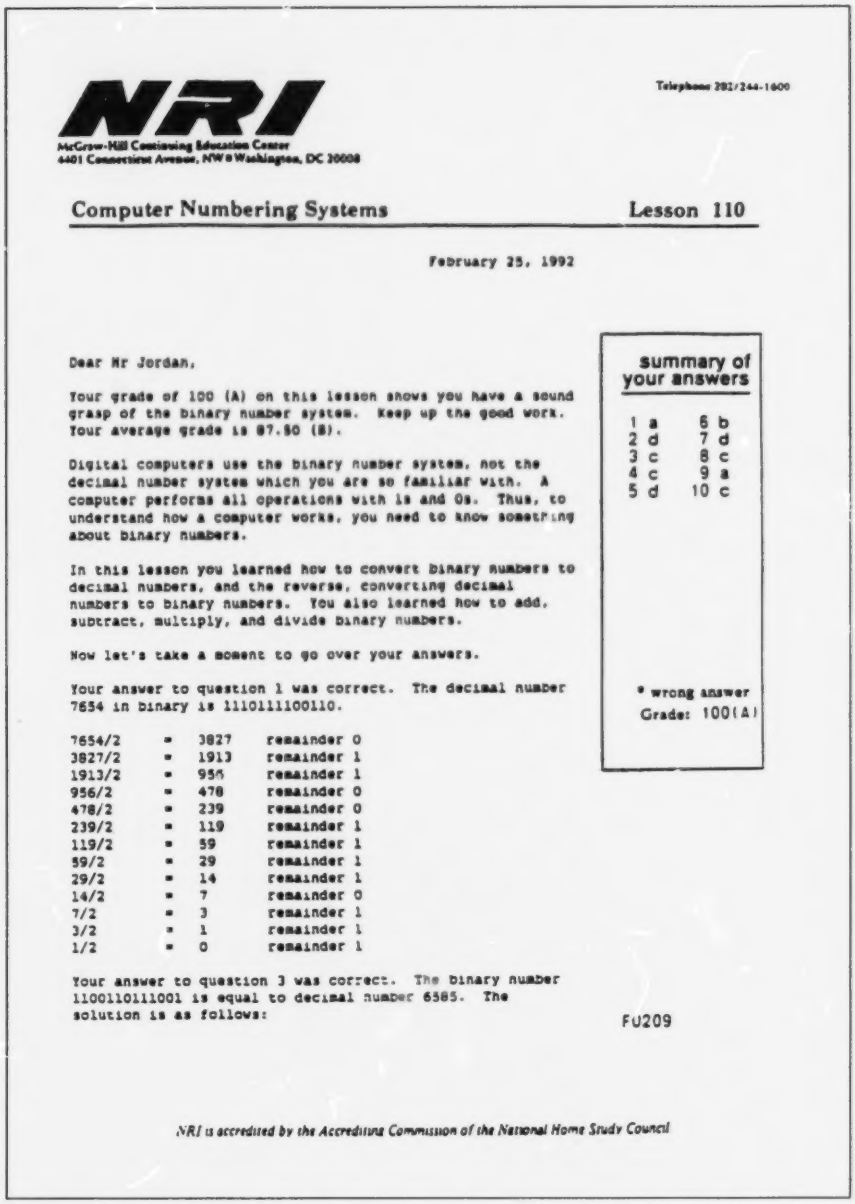
One of the most valuable times to provide recognition and encouragement is at the time of exam completion. The importance of timely feedback on exam results should be obvious as a strong stimulus. Particularly important is the initial exam feedback. Another result from the St. Pierre and Olson study lists the following finding:

> *Prompt lesson return at the beginning of the course was found to be more significant as a determinant of student satisfaction than speed of lesson return later in the course.*

For students who perform poorly, encouragement is strongly needed. For those who perform well, congratulatory comments can serve to promote continued successful achievement.

It is important to concentrate on effective exam evaluations that provide the student with solutions to their errors and reference notations, and that are returned quickly enough to make the impact effective. An example of a detailed exam evaluation is shown in Figure 8.

Figure 8



NRI
McGraw-Hill Continuing Education Center
4401 Connecticut Avenue, NW • Washington, DC 20008

Telephone 202/244-1600

Computer Numbering Systems — **Lesson 110**

February 25, 1992

Dear Mr Jordan,

Your grade of 100 (A) on this lesson shows you have a sound grasp of the binary number system. Keep up the good work. Your average grade is 97.50 (B).

Digital computers use the binary number system, not the decimal number system which you are so familiar with. A computer performs all operations with 1s and 0s. Thus, to understand how a computer works, you need to know something about binary numbers.

In this lesson you learned how to convert binary numbers to decimal numbers, and the reverse, converting decimal numbers to binary numbers. You also learned how to add, subtract, multiply, and divide binary numbers.

Now let's take a moment to go over your answers.

Your answer to question 1 was correct. The decimal number 7654 in binary is 1110111100110.

```
7654/2   =  3827   remainder 0
3827/2   =  1913   remainder 1
1913/2   =  956    remainder 1
956/2    =  478    remainder 0
478/2    =  239    remainder 0
239/2    =  119    remainder 1
119/2    =  59     remainder 1
59/2     =  29     remainder 1
29/2     =  14     remainder 1
14/2     =  7      remainder 0
7/2      =  3      remainder 1
3/2      =  1      remainder 1
1/2      =  0      remainder 1
```

Your answer to question 3 was correct. The binary number 1100110111001 is equal to decimal number 6585. The solution is as follows:

summary of your answers

1 a	6 b
2 d	7 d
3 c	8 c
4 c	9 a
5 d	10 c

* wrong answer
Grade: 100(A)

FU209

NRI is accredited by the Accrediting Commission of the National Home Study Council

Other items that can be used at this time might include:

- Certificates of Achievement
- Extrinsic rewards, such as magnets with encouraging thoughts or savings stamps to use toward the purchase of t-shirts or sweatshirts
- Personalized evaluations
- Special inserts with evaluations listing success stories, or employment statistics
- Progress reports showing exam grades and overall average to date
- Class grade averages indicating class standing

Other Motivational Tools

Other motivational tools that can be utilized throughout your home study courses may include the following:

Instructional Support

The feedback provided by your instructional staff can be the most rewarding motivational tool you can use. Every letter and phone call should begin positively and end with a supportive message. More importantly, of course, is that the instructional service provided is meeting the students' needs, as this will often determine whether or not student continues with his/her program. If the student cannot get the instructional support he would typically find in a resident school, he will become discouraged and his desire to continue will be severely hindered.

Home study provides an excellent opportunity for one-on-one instruction, and schools should take advantage of this tool and make it one of the most effective and important elements in their motivational program.

In a *Continuing Higher Education Review* (Spring 1990, pp. 79-93) article, Suzanne St. Pierre summarized principles of good practice in correspondence study. Two of her findings follow:

1. The role of the home study instructor is more one of facilitation rather than imparting knowledge . . . instructors should imagine what students need, inspire students, and encourage them.

and

2. Nearly every piece of major research on home study supports the hypothesis that communication between instructor and the learner is the most integral ingredient of correspondence study.

Your instructors put students in a class of one, whether it is done via phone, correspondence, or telecommunication. This special attention to students can be very effective in the students' successful completion of their programs. Just knowing they can get support when needed provides the confidence many students need. Use your instructional support as one of your most powerful tools!

Effective Customer Service

Instructional support is not the only need students have. Proper handling of all areas of service during a program can be as meaningful as the instructional support for many students. Removing obstacles by providing a steady supply of study materials and handling all student needs effectively and quickly will encourage continued activity.

Family Support

It is important to encourage this backing from the beginning as home study requires large chunks of time previously devoted to family activities, and the support of family members can make or break the success of a student. Surveys conducted on new enrollees could ask pertinent information about the family. Schools could send a special mailing encouraging support and informing the family members of the value of the educational efforts of the student.

Networking with Other Students

When feasible, this contact with other members of the student body can be extremely supportive. This could be achieved

through regular seminars, telecommunicating, or a variety of other methods available through your programs. Some home study schools offer a variety of options to students upon enrollment. Providing the option of networking with other students gives those who need this peer contact the opportunity to use it.

What's Next?

Many of the motivational efforts listed and discussed in this chapter have worked well and may continue to work in many cases. However, at ICS we are finding that the key to motivation in the future may not be solely with letters, phone calls or other traditional methods that have worked in the past, but may lie in new directions. Perhaps it lies in more drastic measures such as redesigning shipments, or producing materials in a totally different manner, incorporating, for example, more and more technological advances. We may see specialized counselors working with new enrollments and custom designing their program. As society is changing, it will become more and more challenging to motivate home study students, as there are so many competing factors working in their lives.

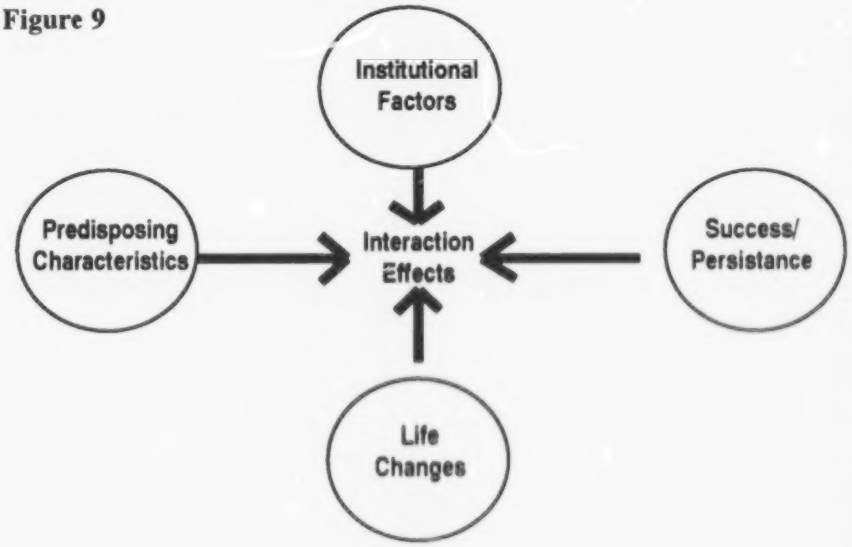
We may need to find ways to personalize learning programs to meet the many varied needs and changing demands of the adult learner.

A study by Powell, Conway, and Ross entitled "Effects of Student Predisposing Characteristics on Student Success" appeared in a 1990 edition of *The Journal of Distance Education.* In this study, the following three factors were listed as having interacting effects on student success/persistence:

- Predisposing Characteristics—such as socioeconomic status or a demographic profile
- Institutional Factors—those under the control of the educational provider, i.e., materials, educational support
- Life Changes—illness, relocation, family problems

These three areas are constantly changing and intertwining to lead the student through a course. The following illustration demonstrates this interaction:

Figure 9



In home study we need to be attuned to the students' predisposing qualities and their continuous life changes, and adjust institutional factors to determine an effective design for a motivational program. The plan of the future may require one system of motivation initially, and perhaps a new direction as the students' needs diversify.

There may be a much more involved series of motivational approaches for someone who is by nature not self-motivated. The program for a self-starter may be a little different. Individuals vary greatly in their needs and Maslow's theory can speak to what needs are most important to us at any time. The key to motivational theory in home study may involve such a customized approach to be effective for all students. Some students may be motivated by extrinsic rewards, some may be encouraged by seeing job opportunities, and some may be so self-motivated that we really don't need to devote much effort to motivate them.

Also important is the fact that home study schools have limited time and resources to spend on motivation. As such, it is important to direct efforts where they will provide the greatest benefit for the student and the school as well. Time and effort should be spent on those students who require special motivational efforts and allow those highly motivated students to blossom on their own. It is unsure what will work for tomorrow, but the feeling is

that motivation, while still using many of the concepts of the past, will begin to head in a new, challenging direction.

Motivation can be very powerful in influencing people's direction and activities, but if not properly applied, or applied to the wrong population, it can be quite ineffective. Whatever motivational methods you use, it is important to remember that the basic need to be motivated to success will not disappear; rather, it will become stronger as society demands more of its workers. Our challenge as home study educators is to stay attuned to the needs of students and society and develop creative approaches to motivating students to complete their programs.

Chapter Ten

Outcomes Assessment

by
Glenn C. Hoyle, Ph.D.
Director of Education
Art Instruction Schools

The Author

Glenn has written other articles on "Outcomes Assessment" for the NHSC. In the Fall 1992 issue of the NHSC News, *he authored an article entitled "Outcomes Assessment for Distance Education: A Case Study in the Use of Telesurveying Methods." Glenn addressed the 1992 Correspondence Education Workshop at Notre Dame University on this same topic.*

Glenn says he has learned that outcomes assessment must be an ongoing process. The results you obtain today are a reflection of the past. Realistically assessing your data gives you the basis for developing and improving your programs to better serve your students tomorrow.

A Vital Task—A Key to Survival

Evaluation and assessment are necessary activities in any home study school. Yet, to be honest, words like *evaluate, measure,* and *assess* are about as warm and compelling as a winter in Minnesota.

What is outcomes assessment? Outcomes assessment is an evaluation that helps you to take action. It is a statement of how well the school has met its goals and objectives. Assessment is a process which helps your school understand how it can improve and enhance its services to your students.

Most of us naturally resist conducting any type of an assessment because—let's face it—assessment is hard work. And we tend to avoid engaging in activities which we see as dry, boring, or intimidating. Yet outcomes assessment is a vital task. This paper is an introduction to some basic techniques which should help you understand how a school can implement an outcomes assessment program.

Establish A Viewpoint

Outcomes assessment becomes much more palatable when we look at it in the correct light. Instead of dreading the task, look at it as a form of planning and marketing—as a service oriented form of quality control. It is a measurement of the quality of results of your school.

But from whose viewpoint will you determine quality? A brief review may be helpful here. For many years a school itself was the sole determiner of the quality of a program it offered. A school's success was based on profitability, student retention rates, overall grades, etc.

Then, for a variety of reasons, voluntary accreditation agencies were formed, such as the Accrediting Commission of the National Home Study Council. The National Home Study Council's publication, *Home Study School Accreditation: Policies, Procedures and Standards,* contains evaluation items for a school's accreditation process. The Self Evaluation Report questions are excellent measures for an outcomes assessment program. Since these measures are published, and widely understood in the field, we will not spend time discussing them in this chapter.

Today, there is a new focus on accountability. Schools are now being asked to base their definition of success not only on what the institution feels is appropriate, and what the accrediting agency finds to be useful measures of educational effectiveness, but also on the viewpoint of the students. Thus, we have seen an emergence in recent years of a strong emphasis on "outcomes based" assessment—a new focus on student results.

In one sense correspondence schools have a distinct advantage over resident schools because we understand that we don't have students, we have "customers." Our goal is to have satisfied customers who feel they have received good value for their invest-

ment. Satisfied customers continue to study. Satisfied customers pay their tuition. And satisfied customers recommend our courses to their friends.

To have satisfied customers we must be providing a service which meets their needs. And to know that you are in fact meeting those needs, you need to be able to measure their outcomes—their results.

As we discussed earlier, your school already has key financial and performance indicators for gauging its success. All of us have had to comply with the evaluation criteria of the National Home Study Council. Now we turn our attention to the student. How can we evaluate our students' successes and failures, and what will we learn about improving our operations?

What You Want to Know—Your Goals and Objectives

The first step in an outcomes assessment is to determine your goals and objectives. All outcomes assessments have the same overall goal: "How good is my program according to the results we have been able to produce?" or, "Do we have a good school? How do we know?" Assessment is a process of determining overall quality.

Good assessments begin at the ending. Famous author Terri Morrison says, "I always write my ending first, that way I know how my book will turn out." It's the same for an outcomes assessment. If you know where you are going at the beginning, you will end up there at the end.

Ask yourself, "When I am finished with this survey, what will it tell me?" Be specific. Or you may wish to state it behaviorally: "At the end of this assessment our school will have learned . . ."—then go on and list the 3 to 5 major points you want to be able to answer.

The next step is to determine your sub-goals and objectives. This is where your evaluation takes on a definite focus. Take the 3-5 major areas you identified as major goals and write objective criteria for each of them.

Let's assume that one of your major questions was: "I want to

know if students are satisfied with the feedback they are receiving from our instructors." Or we could state it: "What is the quality of our instructional feedback?" From this there are many sub-objectives or questions which can be asked:

- Do the students perceive their instructors as being competent and professional?
- Are the instructors writing personal comments to the students?
- Do students find their instructor's comments and information to be helpful?
- What do students like about their instructors? What don't they like?

The quality of your instructional feedback is determined by the answers you receive on these sub-questions, or sub-dimensions to the question. Quality is never just one item, it is a summary of many factors which go into making a school excellent.

As we discussed above, the overall goal is to measure overall quality and to assess students' satisfaction with the course. This raised the question: "What are the dimensions (or attributes) of satisfaction?" We know from customer satisfaction research in industry that there are ten universally basic dimensions of customer satisfaction.[1] They are:

- Tangibles
- Reliability
- Responsiveness
- Competence
- Courtesy
- Credibility
- Security
- Access
- Communications
- Customer Understanding

These ten dimensions can easily be adapted to fit correspondence schools. Since distance education schools provide a product bundled in with a service, our customer satisfaction issues are threefold:

[1]I am indebted to Jeff Cole, a student of Art Instruction Schools, for contributing the customer satisfaction attributes listed here, and the methodology of customer satisfaction index analysis.

1. Satisfaction with the product (course)

    - What is the appearance and quality of your materials?
    - Are the texts easy to read?
    - Are the assignments clear and understandable?
    - Does the information present build sequentially?
    - Are the illustrations and examples in the texts up-to-date and attractive?
    - Etc.

2. Satisfaction with service

    - Are lessons corrected and returned quickly?
    - Is our staff friendly and courteous when contacted?
    - Are our instructors and staff accessible?
    - Do we regularly communicate with our students?
    - Does our newsletter look professional? Is it well written and interesting?
    - Are students satisfied with the feedback our instructors are giving?
    - Etc.

3. Overall customer satisfaction

    - Would our students recommend the course to a friend?
    - Are our students continuing to study? If not, why not?
    - Are they satisfied? If not, why not?
    - What improvements would they suggest?
    - Do they feel they are receiving good value for their money?
    - Etc.

As you can see, each of the goals has been broken down into sub-goals or questions. These are attributes, or dimensions of satisfaction. Now we are getting to a place where our assessment begins to take on character. We can flesh out what we want to assess.

A word of caution here. You need to determine the *scope* and *depth* of your outcomes assessment. Don't let your assessment get bogged down in an attempt to measure everything in exhaustive detail. Determine "up-front" which items are most important to evaluate, and how much effort is warranted for each item. Is it necessary to ask 25 questions about the text materials, when 5 questions will give you the same information? Be ruthless about

adhering to the purpose of your assessment. A concise evaluation which clearly answers 3 major questions is much better than one which discusses 20 items and fails.

Determine Standards and Goals for Each Specific Assessment Attributes

By nature, evaluation is different than research. In research the goal is to find out what causes things. Evaluation is assessment—how good did we do as measured against an announced standard.

An effective outcomes assessment sets goals for future improvement. It is a statement of not only what "is" (a standard), but what "should be" (a goal). To set goals, you need some kind of a standard by which you will measure your data. If you don't measure it, you can't improve it. And if you don't measure it, you're telling your customers—and your employees—it's not important.

For example, the appearance and quality of your materials is an attribute. Now, how will you measure appearance? What criteria constitute satisfaction with the appearance of materials? These criteria can be determined in a variety of ways.

Set definite standards and goals for each attribute you assess. Goals are usually expressed in the form of percentages, although they can be expressed in other ways as well. Make your goals specific, realistic and achievable.

Vague Standards and Goals:

We want our students to like our school.
We want our students to tell others about our school.

Specific Standards and Goals:

- When asked about overall satisfaction with the school, 90 percent of our students will rate us at greater than a "5" on a 7 point scale.

- 80 percent of our students will say they would recommend our school to a friend.

Specific measures enable you to pinpoint those areas you need to

improve. Goals give direction to the assessment and ensure that you answer the questions you have asked at the beginning. The effectiveness of your assessment criteria depends upon the specific questions you ask.

Methodology[2]

The best assessment methodology is the one which gives you the results you need. Here are four steps to help you think through a methodology:

1. Choose an appropriate assessment method

There are a variety of assessment methods which work well. Focus groups, telephone and written surveys, exit interviews, expert judgments, and job placement data are all valid.

Assessment methodology can be categorized from the general to the specific. Focus groups, for example, are useful in generating ideas and helping assessors confirm the results of a survey. Questionnaires can be very specific, but they can be so focused that they ignore areas that you would want to find more about.

Outcomes assessments are often conducted with a survey. Surveys can gather additional information about each student (customer), you can reach a lot of students quickly, and you can employ scientific methods.

Some might argue that questionnaires are biased, or that students might find them to be "cold" or unfeeling. Another argument is that students may not tell you the whole truth in a mailed questionnaire. They have a point, but for the most part surveys are effective and inexpensive.

2. Determine your sampling frame

Whom do you wish to survey? The answer will depend upon the size of your school and how much information you want to obtain. If you are dealing with thousands of students, and you want to have statistical confidence in your assessment, then you will need to use some sort of random sample. A random sample is the best method of making sure that you have the best representation and the most accurate cross-section of respondents in your assessment of the school.

[2]Research and assessment methodology is a complicated and involved subject. Out of necessity, this discussion is limited to the major questions you should address in an Outcomes Assessment Program.

3. Develop your data collection device and write specific questions

Great care should be taken in the development of your data collection device. It is easy to write a survey, obtain responses, and get numbers and percentages which don't have much meaning. Numbers can be misleading and dangerous if you don't ask the right questions, in the right wording, in the right placement. Test your instrument to see if: 1) if the questions accurately communicate the intent of the questions (face validity); and 2) if they in fact measure what you want to measure (content validity).

Quantitative methods (in which everything is reduced to numbers) are commonly used because they're seen as easier to design, tabulate, and analyze. Quantitative methods seek to reduce a large amount of data into a mathematical expression which communicates an overall measure in numbers.

Qualitative methods are expressionistic. Qualitative information is "messier" in that it does not reduce as neatly into numbers and formulas and percentages. However, it provides a view of your students which is unique and personal.

The goal of both methods is to reduce a large mass of data into a summary which accurately reflects your program. Both qualitative and quantitative methods should be used in an outcomes assessment program.

Consider these three examples:

Example 1 (Likert Scale)

Please rate your overall satisfaction with our school. *(Circle one)*

Extremely Satisfied						Extremely Dissatisfied
7	6	5	4	3	2	1

Example 2 (Yes, No)

Overall, are you satisfied with our school? *(Please check one)*

___ YES
___ NO

Example 3 (Open-ended)

In your own words, how would you describe your overall satisfaction with our school?

_____

_____

_____

As you can see, these three questions would produce different looking answers. Each format is valid, and each yields a valuable perspective.

Let's look at what you would include in the survey, and let's look at its appearance. Following are three examples of an evaluation form that you could use. Keep in mind that these are only samples and there are many other ways to develop questionnaires.

Sample 1 is a simple, effective questionnaire. There are many advantages to an assessment form like this. First, it is quick and easy to fill-out. This format will generate ideas. It gives you a quick assessment of your program. It is easy to spot problem areas, and for many questions, it may be all the detail you want.

Sample 1 has some disadvantages. Because it is short, it does not provide much detail. The options are simply "Yes or No" and are not very descriptive.

Sample 2 is a further development which provides more detail about each question. Now it is possible to obtain a mean score ranking for each question. Thus, instead of limiting our answer to saying that "86% of our respondents answered 'Yes' to question 2," we can now say that "overall, the mean score for question 2 is 5.7 on a 7 point scale."

This form has many of the same major disadvantages of Sample 1. The greatest flaw of Samples 1 and 2 is that they are *descriptive* and not *prescriptive.*

Sample 3 is the next logical step in our questionnaire development. This is a problem solving questionnaire. It gives you

"actionable" data. It looks not only at the customer's satisfaction level of each attribute, but also at how important each attribute is to the customer. This is a simple, yet crucial point.

Each question now becomes a goal. If the goals are not being met, programs can be instituted to address the root cause of the problem.

A major disadvantage is that this form is more complex. And the more complex it is, the harder it is for the respondent to fill out, and the lower your response rate is likely to be.

SAMPLE 1

Let Us Know How We Are Doing!

As your instructors and staff of Name of School we are constantly in the process of reviewing our methods of providing service to you, our students.

Please take a few moments now to fill out this form. Send it in with your next lesson. Let us know how we are doing, and how we can help you in your studies. Thanks!

The Text Materials:	YES	NO
Are Easy to Read	_____	_____
Explain Things Clearly	_____	_____
Have Interesting Illustrations	_____	_____
The Assignments are:		
Easy to Do	_____	_____
Returned Quickly	_____	_____
Helpful	_____	_____
My Instructors:		
Are Friendly and Helpful	_____	_____
Give Good Comments	_____	_____
Are Very Knowledgeable about Subject	_____	_____

So far, I would rate this course as: (Circle one)

Excellent Good Fair Poor

Other comments or questions I have about my Name of Course: (Use the back of this form if necessary.)

_____

_____

_____

Name: _____

Student Number: _____

SAMPLE 2

Let Us Know How We Are Doing!

As your instructors and staff of Name of School, we are constantly in the process of reviewing our methods of providing service to you, our students.

Please take a few moments now to fill out this form. Send it in with your next lesson. Let us know how we are doing, and how we can help you in your studies. Thanks! *(Please circle the appropriate number.)*

The Text Materials:	Strongly Agree			Neutral		Strongly Disagree	
Are Easy to Read	7	6	5	4	3	2	1
Explain Things Clearly	7	6	5	4	3	2	1
Have Interesting Illustrations	7	6	5	4	3	2	1

The Assignments are:	Strongly Agree			Neutral		Strongly Disagree	
Easy to Do	7	6	5	4	3	2	1
Returned Quickly	7	6	5	4	3	2	1
Helpful	7	6	5	4	3	2	1

My Instructors:	Strongly Agree			Neutral		Strongly Disagree	
Are Friendly and Helpful	7	6	5	4	3	2	1
Give Good Comments	7	6	5	4	3	2	1
Are Very Knowledgeable about Subject	7	6	5	4	3	2	1

So far, I would rate this course as: (Circle one)

Excellent Good Fair Poor

Other comments or questions I have about my Name of Course: (Use the back of this form if necessary.)

_____

Name: _____ Student Number: _____

SAMPLE 3

Let Us Know How We Are Doing!

As your instructors and staff of Name of School we are constantly in the process of reviewing our methods of providing service to you, our students.

Please take a few moments now to fill out this form. Send it in with your next lesson. Let us know how we are doing, and how we can help you in your studies. Thanks!

The Text Materials: (For each question please circle ***one number*** in the left hand column and one in the right hand column.)

1. Are Easy to Read

How important is this to you?

Strongly Agree			Neutral			Strongly Disagree
7	6	5	4	3	2	1

Very Important			Neutral			Not Important at all
7	6	5	4	3	2	1

2. Explain Things Clearly

How important is this to you?

Strongly Agree			Neutral			Strongly Disagree
7	6	5	4	3	2	1

Very Important			Neutral			Not Important at all
7	6	5	4	3	2	1

3. Have Interesting Illustrations

How important is this to you?

Strongly Agree			Neutral			Strongly Disagree
7	6	5	4	3	2	1

Very Important			Neutral			Not Important at all
7	6	5	4	3	2	1

The Assignments are:

4. Easy to Do

How important is this to you?

Strongly Agree			Neutral			Strongly Disagree
7	6	5	4	3	2	1

Very Important			Neutral			Not Important at all
7	6	5	4	3	2	1

5. Returned Quickly

How important is this to you?

Strongly Agree			Neutral			Strongly Disagree
7	6	5	4	3	2	1

Very Important			Neutral			Not Important at all
7	6	5	4	3	2	1

6. Helpful

How important is this to you?

Strongly Agree			Neutral			Strongly Disagree
7	6	5	4	3	2	1

Very Important			Neutral			Not Important at all
7	6	5	4	3	2	1

Continued on the next page...

My Instructors:

7. Are Friendly and Helpful

How important is this to you?

Strongly Agree			Neutral			Strongly Disagree
7	6	5	4	3	2	1

Very Important			Neutral			Not Important at all
7	6	5	4	3	2	1

8. Give Good Comments

How important is this to you?

Strongly Agree			Neutral			Strongly Disagree
7	6	5	4	3	2	1

Very Important			Neutral			Not Important at all
7	6	5	4	3	2	1

9. Are Very Knowledgeable about Subject

How important is this to you?

Strongly Agree			Neutral			Strongly Disagree
7	6	5	4	3	2	1

Very Important			Neutral			Not Important at all
7	6	5	4	3	2	1

So far, I would rate this course as: (Circle one)

Excellent	Very Good	Good	Fair	Poor
5	4	3	2	1

Other comments or questions I have about my Name of Course: (Use the back of this form if necessary.)

_____

_____

_____

Name: _____

Student Number: _____

Data Tabulation and Analysis

Data tabulation and analysis is the next step in the assessment process. If you use some kind of a questionnaire to gather data you can use a PC based spreadsheet (such as Lotus or EXCEL) or a statistical package to compute means and monitor trends.

The general rule is to tabulate everything. How many students responded to the questionnaire. How many checked "Yes" or "No"? What are the percentages? What are the means? Compute the easiest statistics first. If you see trends that are interesting, then you can investigate further. Avoid complex statistical manipulations. The major trends in your data will be apparent. At a minimum you should calculate:

For the total questionnaire:

- The total number of people in your population
- The total sample size
- The number of respondents
- The response rate

On an item by item basis you should calculate:

- The number of people responding to the item—the "n"
- The frequencies of the choice
- Percentages and mean scores (if applicable)

Set up reports that will be automatically tabulated. This makes it easier to generate the same reports time after time. Automate it, so that you can get the results you want with a minimum of hassle. Make sure that your measurements come at benchmarked intervals. Then develop a form (such as the one we will look at next) to assess and monitor your results.

One of the themes of this chapter is that the goal of an outcomes assessment program is to obtain "actionable" data. Actionable data helps you to identify what actions you need to take to improve your program. You want to make sure that you have programs in place to follow-up with dissatisfied customers/students.

And the survey process itself needs to be periodically reviewed for continual improvement opportunities.

For every dollar or hour you spending making improvements, you want to be certain that you're improving those attributes which will have the most impact on customer satisfaction or profits. It's hard to do that unless you know what is most important to the customer. This successfully couples the concept of value analysis with customer satisfaction analysis.

With this approach you not only see how you are doing versus your overall goals but also prioritize your improvement efforts.

Here is one type of an analysis format which will help you analyze and prioritize your improvement efforts.

Figure 1. Customer Satisfaction Index Analysis

Customer Satisfaction Index Analysis					
A Customer/Student Desires	B Relative Importance	C Customer Reception of School Performance	D Targeted Performance	E Improvement Ratio	F Priorities

Column A is a list of attributes.
Column B is the mean customer rating (1-7 or 1-5 point scale of how important that attribute is to him or her).
Column C is the mean customer satisfaction rating of that attribute (must be on the same scale as Column B).
Column D is your goal (i.e., 5.5 on a 7-point scale) for that attribute.
Column E is Column D divided by Column C.
Column F is Column B multiplied by Column E. Column F gives you your priorities. The larger the number, the higher the priority.

Figure 2 shows how to plot the results in an easy to understand grid. For each attribute (for example timeliness) you have the mean score for both importance and satisfaction. You simply plot this on the grid. The grid shows that you should try to perform well on those things that are important.

Figure 2. Customer Satisfaction Matrix

IMPORTANCE	SATISFACTION: 1, 2, 3	SATISFACTION: 5, 6, 7
4, 5, 6	A Needs Improvement	B Performing Well
1, 2, 3	C Low Priority	D Over Delivering

Quadrant "A," stands for *Action!* These are the areas which your students rank low in terms of their satisfaction and high in level of importance for them.

Quadrant "B" stands for *Bravo!* You're performing well here. Students are highly satisfied with important items.

Quadrant "C" stands for *Concern.* You're not doing well here, but it is ranked as a low priority for your students. Watch these items carefully. You have a concern about them, but you may not want to take action—yet.

Quadrant "D" stands for *Do Less.* Putting effort into areas that are of low importance (which students are already satisfied with) constitutes "over-delivering," which is a waste of time or money.

Areas where you're not performing well, and are not important to the customer are low priorities. A crucial area is where you are performing low in an area of importance to the student/customer. If you're in this quadrant of the grid you are in danger of losing customers and revenue. The goal is to be in the upper right hand corner.

Planning the Assessment

All plans evolve into work. Making the assessment happen is an on-going process. Who will do "what," "when." And what will be the cost. Here are some practical tips for an action plan:

- Put one person in charge of the assessment. Evaluations happen when one person is entrusted with this responsibility.
- Set a defined time for your evaluation, and hold people accountable for producing a report.
- Consistency in reporting formats is essential in order to monitor trends over time.
- Establish a budget.

The On-going Report

Accredited home study schools should be able to produce evidence that they have an effective and on-going outcomes assessment program. Document your written procedures for implementing your assessment—otherwise you will have to re-invent your assessment program each year. And that is a waste of time and money.

Your school should produce an annual report which summarizes the program, with a summary of the results and the trends which are being monitored for continuous improvement.

The format of your documentation procedures for your report would include (but is not limited to):

1. Executive Summary
2. Objectives and Goals
3. Methodology
4. Implementation
5. Results
6. Recommendations (Including Financial Impact)
7. Plan for Follow-up and On-going Monitoring.

Successful assessments have short, concise and clearly understandable reports. They show the data that every school executive needs to know in order to improve the operations of the school. Remember, if you don't measure it, you can't improve it.

Summary

A good outcomes assessment program is a commitment to a continuing process of self-improvement in the services we are bringing to our students. It is an on-going planning and marketing process by which we strive to keep our schools competitive and keep our students sold on the value of studying with us.

Outcomes assessment is about continuous improvement. If you want to understand your strengths and weaknesses, then do it. If you want to grow and change, then do it.

Outcomes assessment is dynamic. The methods and measures we use today will be different than those we use tomorrow in our on-going search for continuous improvement.

The key to success is focus. Identify those 3-4 major questions which are critical to your school's success and then answer those questions. If you don't measure your student outcomes, and how satisfied they are, then you are playing "customer roulette."

It is true: at least 80% of what you will uncover in an outcomes assessment program will only confirm what you already know. It is the unknown 20%, where you will gain your best value. Remember, while you want to describe what is going on in your school, you primarily want to discover "actionable" items where you can make a difference. Tie your student's satisfaction to customer retention and to the bottom line.

One last thought. There are many different methods of developing effective outcomes assessment programs. Furthermore, what works for one school may not work for another. Thus, there are no universal rules—only commonly committed sins. And the cardinal sin is to do nothing about outcomes assessment.

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